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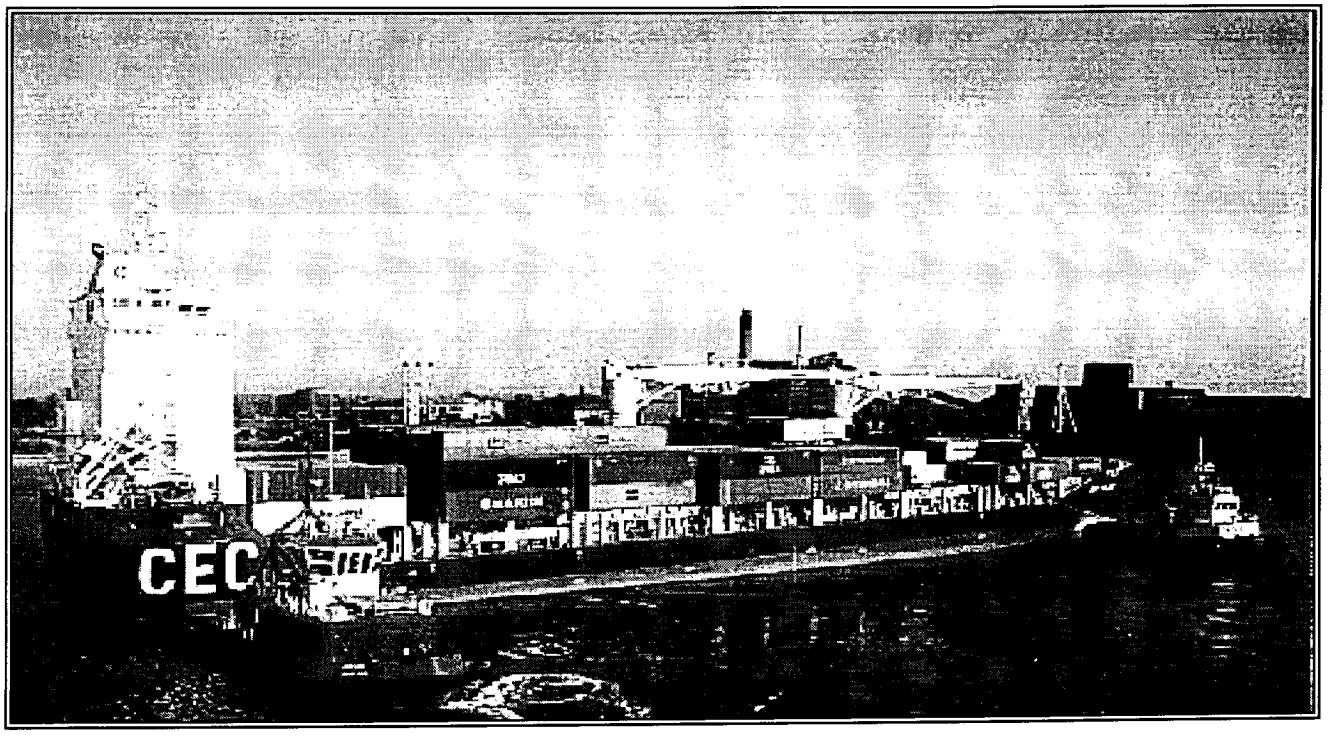
UPDATE ON INDIAN PORT SECTOR

(30.09.2014)



परिवहन अनुसंधान प्रभाग

TRANSPORT RESEARCH WING

पोत परिवहन मंत्रालय

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PREFACE

As per the decision of the Maritime State Development Council, the Transport Research Wing in the Ministry of Shipping has been bringing out the biannual publication "*Update on Indian Port Sector*". Present issue (upto September, 2014) is twenty-fourth in the series of the publication *"Update on Indian Port Sector"*. The last issue contained data up to March, 2014.

The current issue of the *"Update on Indian Port Sector"* includes the information on the performance of Major and Non-Major Ports for the period up to end of September, 2014. The list of private sector/captive/joint sector port projects under implementation/consideration at Major Ports and Non-Major Ports have also been included. The cooperation extended by the concerned source authorities is gratefully acknowledged.

January, 2015

(RAJIVE KUMAR)

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UPDATE ON INDIAN PORT SECTOR

(UP TO 30.09.2014)

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1.1 International and Domestic Factors Related to Seaborne Trade

1.1.1 Global economic growth underperformed in 2013, with the situation in developed economies improving slightly and a number of setbacks constraining economic activity in developing regions. World GDP expanded by 2.3 per cent in 2013, the same rate as the previous year. The performance across the major country groupings was uneven. Growth in GDP in developed economies accelerated to 1.3 per cent as compared with 2012, while it decelerated in developing economies and the economies in transition. These trends highlight some redistribution of economic growth away from developing countries to the advanced economies.

1.1.2 Growth in GDP in the United States of America slowed down from 2.3 per cent in 2012 to 2.2 per cent in 2013 while the European Union appeared to be emerging from the long recession as growth improved slightly (0.1 per cent in 2013 as compared with -0.3 per cent in 2012). Economic growth in Japan remained positive and expanded at a faster rate than in 2012 (1.6 per cent), reflecting, in particular, the stimulus effect of the monetary policies in place.

1.1.3 Developing countries ï the global growth catalyst of recent years ï have been facing difficulties stemming from some domestic challenges and unfavourable external conditions, including weaker investor sentiment, a relative slowdown in Chinaôs growth, and financial-sector disturbances.

1.1.4 Growth in the transition economies was particularly affected by the rapid deceleration of GDP growth in the Russian Federation (1.3 per cent in 2013, down from 3.4 per cent in 2012).

1.1.5 Growth in GDP, merchandise trade and seaborne shipments are interlinked and continue to move in tandem. Trade can generally grow faster or slower than GDP, although since the 1990s it has tended to grow about twice as fast.

1.1.6 **Table 1** gives the growth of cargo at Indian ports and related parameters of Indian and world trade.

Table 1: Growth in Cargo handled at Indian Ports and related parameters (in %)

Parameters	2009-10	2010-11	2011-12	2012-13	2013-14	April-September	
						2013-14	2014-15
Trends in India's Select : Macro Parameters							
I. Total Cargo	14.2	4.2	3.2	2.2	4.5	6.6	7.0
(a) Major Ports	5.7	1.6	-1.7	-2.6	1.8	2.4	4.1
(b) Non Major Ports	35.5	9.1	12.2	9.7	8.3	12.8	11.1
II.GDP overall	8.4	9.3	6.3	4.5	4.7	4.9	5.5
(a) Agriculture	1.0	7.9	5.7	1.4	4.7	4.5	3.5
(b) Industry	8.4	9.2	6.2	1.0	0.4	1.1	3.2
(c) Services	10.5	9.8	6.5	7.0	6.8	6.8	6.9
III. Foreign Trade							
(a) Export in $ value	-3.5	40.5	21.8	-1.8	4.1(P)	5.14	6.47
(b) Import in $ value	-5.0	28.2	32.3	0.3	-8.3(P)	-1.8	1.57
Trends in Select : Global Indicators							
IV. World Output	0.0	5.4	4.1	3.4	3.3	3.3F	3.8f
(a) Advanced Economies	-3.4	3.1	1.7	1.2	1.4	1.8F	2.3f
(b) Developing Economies	3.1	7.5	6.2	5.1	4.7	4.4F	5.0f
V. World Economic Growth	-2.2	4.1	2.8	2.3	2.3	2.7F	
(a) Advanced Economies	-3.8	2.6	1.4	1.1	1.3	1.8F	
(b) Developing Economies	2.4	7.9	6.0	4.7	4.6	4.7F	
(c) Transition Economies	-6.6	4.5	4.7	3.3	2	1.3F	
VI. World Trade Volume (Goods)	-11.9	14.0	6.8	2.7	2.7	3.8F	5.1f
VII. Export Volume growth (Goods)							
(a) Advanced Economies	-13.5	14.5	6.0	1.7	1.9	3.6F	4.6f
(b) Developing Economies	-7.8	13.5	7.3	5.1	4.3	4.0	5.7
VIII. Import Volume (Goods)							
(a) Advanced Economies	-13.7	13.5	5.2	0.5	1.3	3.4F	4.5f
(b) Developing Economies	-9.5	14.8	10.5	6.0	4.8	4.5F	6.2f
IX. World Seaborne Trade*	-5.0	7.4	4.3	4.6	3.6	NA	
(a) Goods Loaded	-4.5	7.0	4.5	4.7	3.8	NA	
(b) Goods Unloaded	-5.5	7.8	4.2	4.4	3.4	NA	

I. Based on data from Major Ports and Non Major Ports

II. Based on gross domestic product (GDP) at Factor Cost (2004-05 Prices), Central Statistical Organization;

III. Based on Department of Commerce, DGCI&S and RBI Bulletin

IV,VI, VII & VIII Based on World Economic Outlook, October ,2014, IMF;

V & IX. Based on Review of Maritime Transport, 2014(November), UNCTAD

Note : MT: Million Tonnes; For item Nos IV, VI, VII &VIII year 2009-10 refers to calendar year 2009 and so on; **F** refers to forecast for 2014 and **f** refers to forecast for the year 2015;

* growth in total goods loaded plus unloaded; NA ; Not Available (P) Provisional

Emerging Trends Affecting Seaborne Trade

1.1.7 The performance of world seaborne trade in 2013 was shaped by various trends, including a more balanced growth in demand (trade), a continued persistent oversupply in the world fleet across the various market segments relatively high bunker price levels, as well as a wider use of slow steaming, especially in the container-ship sector. Volumes expanded at the slower rate of 3.8 per cent, taking the total to nearly 9.6 billion tonnes. Of these shipments, dry cargo (major and minor dry commodities carried in bulk, general cargo, breakbulk and containerized trade) accounted for the largest share (70.2 per cent), followed by tanker trade (crude oil, petroleum product and gas) which held a 29.8 per cent share. Much of the expansion in 2013 continued to be driven by growth in dry-cargo flows which grew by 5.5 per cent to reach 6.7 billion tonnes.

1.1.8 While in 2013 economic growth decelerated in developing countries, they nevertheless continued to contribute larger shares to international seaborne trade. Their contribution in terms of global goods loaded increased to 61 per cent up from 60 per cent in 2012, while their import demand as measured by the volume of goods unloaded reached 60 per cent up from 58 per cent in 2012. The shares of goods loaded and unloaded in developing countries have become almost on a par in recent years.

1.1.9 Asia remained the main loading and unloading area in 2013 with its share of imports (unloading) being particularly dominant. Other major loading areas were, in descending order, the Americas, Europe, Oceania and Africa. On the unloading side, the other regions with the largest shares, besides Asia, in ascending order were Europe, the Americas, Africa and Oceania. These shares are likely to further evolve with changing trade patterns and partners, the emergence of Africa and developing America as areas with a significant growth potential, and fast growing trade on secondary container trade routes supporting Southï South and intraregional trade.

Table 2 : Developments in International Seaborne Trade (Million Tonnes)

Year	Oil	Main Bulk#	Other Dry Cargo	Total
2000	2163	1295	2526	5984
2006	2698	1814	3188	7700
2007	2747	1953	3334	8034
2008	2742	2065	3422	8229
2009	2642	2085	3131	7858
2010	2772	2335	3302	8409
2011	2794	2486	3505	8784
2012	2841	2742	3614	9197
2013	2844	2920	3784	9548

iron ore, grain, coal, bauxite/alumina and phosphate. Source: Review of Maritime Transport,2014,UNCTAD

Crude Oil and Petroleum products

1.1.10 Global crude oil shipments fell by 1.7 per cent in 2013 with total volumes averaging 1.8 billion tonnes. Factors at play included the supply and demand dynamics resulting from geopolitical disruptions, growing domestic production in the traditionally largest consumer market, as well as the overall weak global economic conditions and constrained demand. Weaker demand for imported crude oil in the United States and refinery closures in Europe contributed significantly to the decline. Main unloading ports or importing areas were located in Japan, North America, Europe and developing Asia. Crude oil imports into the United States fell by 13 per cent from 7.7 million to 6.7 million barrels per day (bpd) (British Petroleum, 2014), the lowest level recorded for more than two decades. Imports also fell in Canada and Japan. Elsewhere, Chinaôs seaborne crude imports increased by 6.8 per cent reaching 7.7 million bpd and therefore surpassing the United States as the worldôs largest net oil importer. Other importers, including Africa, developing America, Australia, Europe, India and Singapore have all increased their crude oil imports, although at different rates. Imports into Asia reflect growing consumption needs but also efforts by countries in the region, including China and India, to build local refineries.

1.1.11 Major crude oil loading areas continued to be located in Western Asia, Africa, developing America and the transition economies. Almost all major crude oil exporters reduced their exports or matched the 2012 levels. While Canada increased its crude oil shipments in 2013 (8.6 per cent), others, including developing America, Western Asia, the transition economies and Africa have seen their exports constrained.

1.1.12 In 2013, oil product shipments increased by 4.7 per cent, compensating to some extent for the drop in crude oil shipments. Estimates by UNCTAD suggest that world oil product shipments, including gas trade, have increased by 3.1 per cent from 1.06 billion tonnes in 2012 to 1.09 billion tonnes in 2013, driven in particular by growing export volumes from the United States (+18.5 per cent in 2013). As the surplus crude oil volumes produced in the United States could not be exported, refineries in the country are processing the crude with a view to oil product exports. In 2013, China, the economies in transition, Europe, Singapore and Western Asia increased their shipments, while in some regions exports either contracted (Africa, developing America and India) or came to a standstill (Canada).

Dry-cargo Bulks:

1.1.13 Dry-bulk commodities are the backbone of international seaborne trade, reflecting, in particular, the fast growing demand from emerging developing regions. In 2013, world dry-cargo shipments reached 6.7 billion tonnes, a 5.5 per cent growth over 2012. The dry-bulks trade increased by 5.6 per cent and accounted for 64.6 per cent of global dry-cargo volumes. Of this total, the five major dry bulks totalled about 2.9 billion tonnes while minor dry bulks reached 1.4 billion tonnes. The five major dry bulk commodities continued to drive growth in this market segment rising by 6.5 per cent in 2013 as compared with 3.5 per cent in 2012.

Coal

1.1.14 In 2013, the total volume of coal shipments (thermal and coking) increased by 5.0 per cent to reach 1.18 billion tonnes. Accounting for nearly 78.0 per cent of the coal trade, thermal shipments increased by 2.9 per cent, a rate much slower than the 14.6 per cent recorded in 2012. Asian imports are the main contributor to global coal trade with volumes expanding rapidly over recent years. Asiaôs thermal coal import volumes recorded the fastest growth (5.3 per cent) while import volumes into the European Union contracted by 5.9 per cent. Major importers included China, Germany, India, Japan, Malaysia, the Republic of Korea, Taiwan Province of China and the United Kingdom.

Iron ore shipments and steel production and consumption

1.1.15 Reflecting continued growth in the steel industry, global iron-ore trade increased by 7.1 per cent with volumes doubling between 2004 and 2013. Iron-ore shipments totalled nearly 1.2 billion tonnes in 2013 up from 1.1 billion tonnes in 2012 and 593 million tonnes in 2004. Major iron-ore exporters were Australia and Brazil, which together accounted for 75.6 per cent of world iron-ore shipments in 2013. However, other smaller suppliers are increasingly emerging as important markets that can offer promising prospects for shipping, especially in Africa. In 2013, while the majority of dry-bulk exports were shipped from South Africa, other African countries have also been contributing larger shares. These include iron-ore exporters from Liberia and Sierra Leone and coal exports from Mozambique. Expansion of coal and iron ore mining capacity, including in Guinea, are likely to significantly increase dry-bulk cargo volumes shipped out from Africa. Indiaôs iron-ore exports declined while its import demand for dry-bulk commodities generally continues to grow. Being the fourth largest steel producer worldwide, India is also

increasingly importing coking coal, a trend set to continue in the coming years due to the planned increase in steelmaking capacity.

Dry cargo: Minor bulks

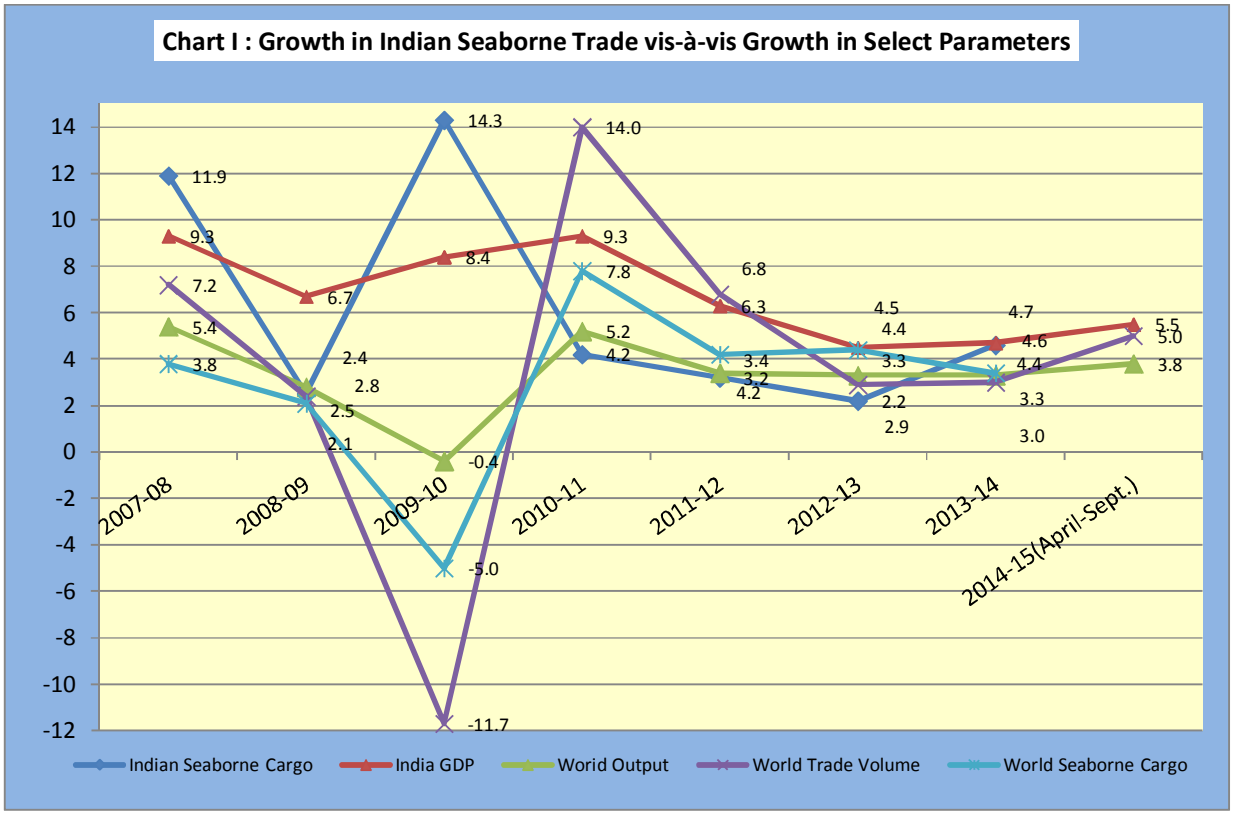
1.1.16 In 2013, growth in minor-bulks trade decelerated to 3.9 per cent (Clarkson Research Services, 2014), with total volumes averaging 1.4 billion tonnes. Of this total, 44 per cent was accounted for by metals and minerals (for example, cement, nickel ore, anthracite), 34 per cent by manufactures (that is, forest and steel products) and 21.9 per cent by agribulks (for example, sugar). Metals and minerals recorded the fastest growth (6 per cent) followed by manufactures (3.7 per cent) and agribulks, which remained flat owing to reduced oilseed/meal trade and limited sugar-trade growth.

Other dry cargo: Containerized trade

1.1.17 Global containerized trade grew by 4.6 per cent in 2013 taking total volumes to 160 million TEUs, up from 153 million TEUs in 2012. Overall, containerized trade flows in 2013 unfolded in the context of (a) further cascading of larger tonnage down from the main lanes to smaller and secondary routes, (b) greater uptake of slow steaming which started in 2007 in response to a rapid increase in bunker prices with a view to address capacity oversupply, and (c) continued efforts to build alliances. Building shipping alliances, in particular, is becoming an important strategy for ship owners to control costs and maximize capacity utilization on larger ships, as illustrated by the alliance building activity and service-cooperation agreements between carriers in 2013.

1.2 India: Seaborne Cargo Traffic

1.2.1 The growth in Indiaôs GDP, Port traffic and growth in World output, export volume and seaborne trade (loadings and unloading) since 2007-08 is given in Chart **I.**



Source: Indian Seaborne Cargo-Major and Non-major ports
India's GDP-Central Statistics Office.
World Output and World Trade Volume- World Economic Outlook, October 2014, IMF
World Seaborne Cargo- Review of Maritime Transport, November, 2014, UNCTAD

1.3 Cargo Traffic at Indian Ports

Table 3 : Trends in Cargo Handled at Major & Non-Major Ports (Million Tonnes)

Major/Non-Major	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14(P)	April-September	
								2013-14(P)	2014-15(P)
Major Ports	519.32	530.81 (2.2)	561.09 (5.7)	570.09 (1.6)	560.19 -(1.7)	545.83 -(2.6)	555.49 (1.8)	277.23	288.48 (4.1)
Non-Major Ports	206.39	213.24 (3.3)	288.94 (35.5)	315.35 (9.1)	353.74 (12.2)	387.92 (9.7)	420.24 (8.3)	204.04	226.69 (11.1)
All Ports	725.71	744.05 (2.5)	850.03 (14.2)	885.44 (4.2)	913.93 (3.2)	933.75 (2.2)	975.73 (4.5)	481.27	515.18 (7.0)

(P)- Provisional
Note: Figures in parenthesis indicate growth over the previous year.

1.3.1 During the first half (April-September) of 2014-15, major and non-major ports in India accomplished a total cargo throughput of 515.2 million tonnes reflecting an increase of 7.0% over the same period last year**. (Table 3).** Non major ports' cargo

growth was 11.1% while that of Major Ports was only 4.1% during the period. Trend in traffic handled at Major and Non-major ports is given in **Table 3**.

1.4 Cargo Traffic at Major Ports

1.4.1 Volume of seaborne cargo traffic is essentially in the nature of derived demand and is mainly shaped by the levels and changes in both the global and domestic activity. Total cargo traffic handled by Indiaôs major ports during first six months (April-September) of 2014-15 was 288.48 million tonnes compared to 277.23 million tonnes during April-September of 2013-14 achieving a growth of 4.1 %.

Table 4 : Traffic Handled at Major Ports (Thousand Tonnes)

Ports	2012-13	2013-14(P)	April-September *		
			2013-14	2014-15	% Change over CP
Kolkata	39928	41385	21309	20760	-2.6
Kolkata DS	11844	12874	6424	6698	4.3
Haldia DC	28084	28511	14885	14062	-5.5
Paradip	56552	68003	34119	35479	4.0
Vizag	59038	58503	28936	30589	5.7
Kamarajar(Ennore)	17885	27337	12676	14649	15.6
Chennai	53404	51105	26249	26717	1.8
Chidambaranar(Tuticorin)	28260	28642	14093	15716	11.5
Cochin	19845	20887	10847	11355	4.7
New Mangalore	37036	39365	19376	18230	-5.9
Mormugao	17738	11739	5161	6307	22.2
Mumbai	58038	59184	27581	29831	8.2
JNPT	64488	62333	30930	32307	4.5
Kandla	93619	87005	45951	46539	1.3
All Ports	**545831**	**555488**	**277228**	**288479**	4.1

*Source : IPA
(P): Provisional

1.4.2 During first six months of 2014-15, Mormugao Port (22.2%) recorded highest growth in traffic followed by Kamarajar (Ennore) (15.6%), Chidambaranar (V.O.C.) (11.5%), Mumbai (8.2%), Vishakhapatnam (5.7%), Cochin (4.7%), Jawahar Lal Nehru (4.5%), Kolkata Dock System(KDS) (4.3%), Paradip (4.0%), Chennai (1.8%) and Kandla (1.3%) over April-September 2013-14. Major ports which recorded a negative growth in traffic during April-September 2014 are : New Mangalore (5.9%) followed by Haldia Dock Complex(HDC) (5.5%).

1.4.3 Amongst the Major Ports, Kandla Port handled the maximum Cargo of 46.54 million tonnes during April ï Sept., 2014 with a share of 16.1% in the total cargo handled during the period, followed by Paradip (12.3%), JNPT (11.2%), Vishakhapatnam (10.6%), Mumbai (10.3%), Chennai (9.3%), New Mangalore (6.3%), Chidambaranar (5.4%),

Kamarajar (5.1%), HDC (4.9%), Cochin (3.9%), KDS (2.3%) and Mormugao (2.2%). Port-wise traffic handled during 2012-13, 2013-14 & first half of 2013-14 and 2014-15 is given in **Table:4.**

Commodity wise Cargo Traffic at Major Ports

1.4.4 At a broad commodity level during first six months of 2014-15, Other Cargo, Fertilizers & FRM, Coal and Containers posted growth of 14.5%, 14.1%, 5.5% and 4.9% respectively. The traffic in Iron ore and POL was affected during April-September, 2014 recording a negative growth of 22.5% and 0.6% respectively. **(Table: 5).**

1.4.5 In the liquid bulk category, crude and petroleum cargo declined by -0.6% during April-September, 2014 compared to a growth of 3.9% in the same period of last year. Growth in Coal traffic has decelerated to 5.5% in April-September 2014 after achieving steep growth of 29.0% during April-September 2013.

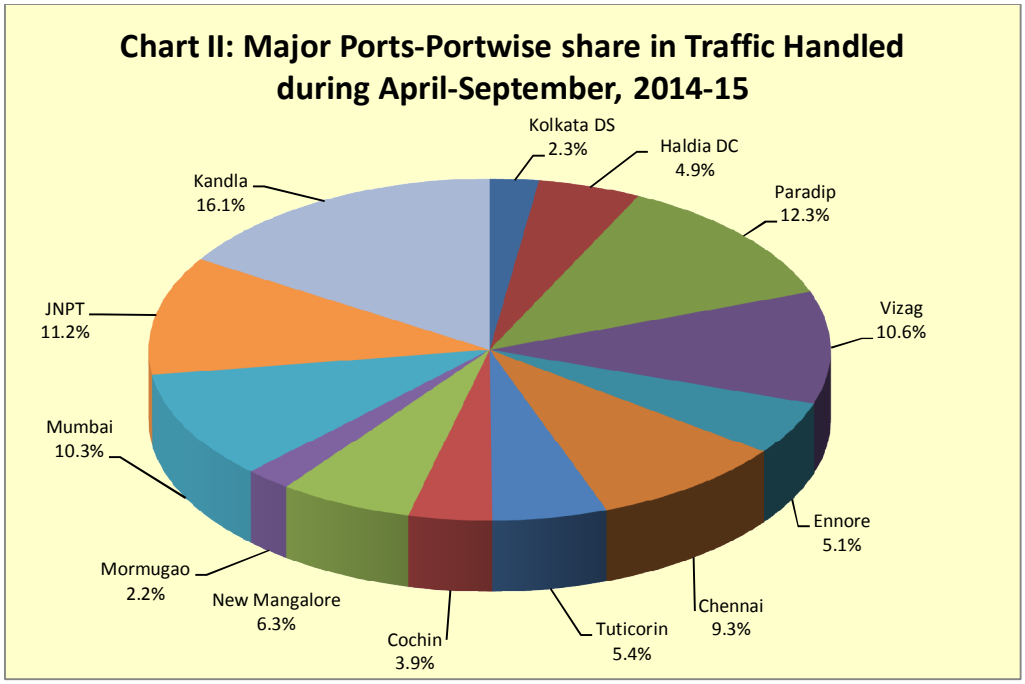
1.4.6 In terms of composition of cargo traffic handled at major ports during April ï Sept., 2014, the largest commodity group (with share in percent in total cargo handled) was POL (32.6%) followed by Other cargo(21.2%), Container traffic (21%), Coal (19.2%), Iron Ore (3.2%) and Fertilizer & FRM (2.8%).

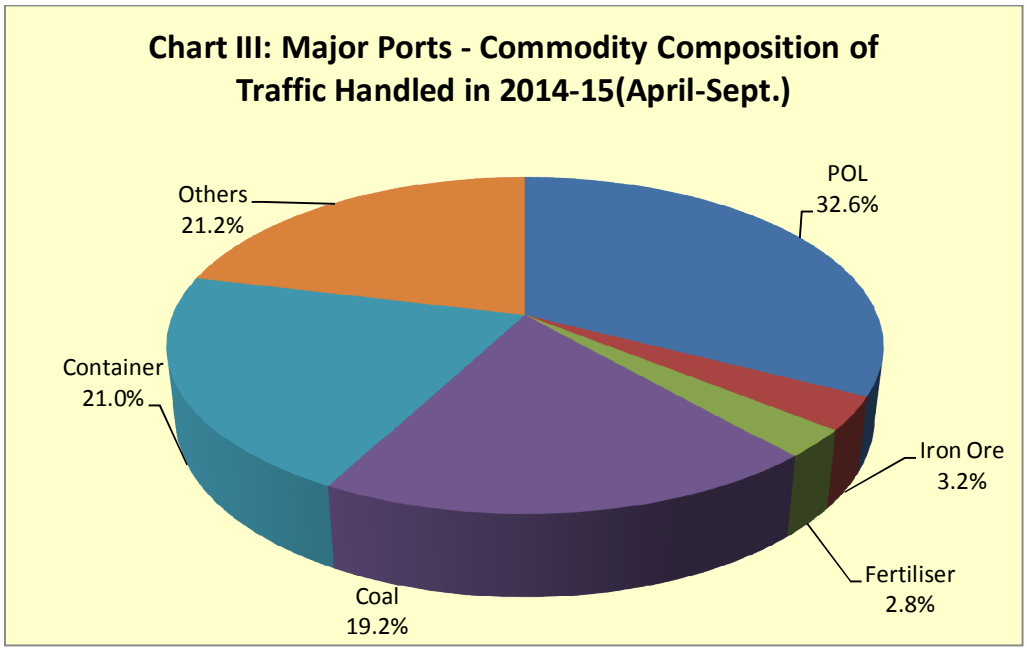
Table 5 : Commodity-wise Traffic Handled at Major Ports (Thousand Tonnes)

Commodity	2012-13	2013-14(P)	April-September		
			2013-14	2014-15	% Change over CP
POL	180725	187162	94544	93983	-0.6
Iron Ore	27289	24766	11846	9177	-22.5
Fertiliser	**14797**	**13703**	**6967**	**7952**	**14.1**
a. Finished	7469	6103	3475	3624	4.3
b. Raw	7328	7600	3492	4328	23.9
Coal	**86804**	**104515**	**52558**	**55474**	**5.5**
a. Thermal Coal	58772	71369	36481	39393	8.0
b. Coking Coal	28032	33146	16077	16081	0.0
Container	119866	114641	57834	60639	4.9
Others	116350	110701	53479	61254	14.5
Total	**545831**	**555488**	**277228**	**288479**	**4.1**

(P) : Provisional; CP : Corresponding period-April-September 2013-14

1.4.7 The port-wise and commodity-wise shares of total cargo traffic during April-September, 2014-15 are depicted in the **Charts II and III** respectively.





POL: Petroleum, Oil & Lubricants

1.4.8 The Port-wise & commodity-wise traffic handled at major ports during the years 2012-13 and 2013-14 and first six months of 2013-14 and 2014-15 are given in **Annex II.**

Container Traffic

Table 6: Container Traffic at Major Ports (in Thousand tonnes/TEUs)

PORT	2012-13		2013-14(P)		April-September				% Change over CP			
					2013-14		2014-15		2013-14		April- Sep. 2014-15	
	Tn	TEU	Tn	TEU	Tn	TEU	Tn	TEU	Tn	TEU	Tn	TEU
Kolkata	6960	463	7062	449	3726	238	3985	257	1.5	-3.0	7.0	8.0
Haldia	2869	137	2202	114	1129	60	940	57	-23.2	-16.8	-16.7	-5.0
Paradip	171	13	99	9	28	3	26	2	-42.1	-30.8	-7.1	-33.3
Visakhapatnam	4554	247	4916	262	2533	131	2380	134	7.9	6.1	-6.0	2.3
Chennai	29708	1539	28330	1468	14602	757	15283	792	-4.6	-4.6	4.7	4.6
Ennore	0	0	0	0	0	0	0	0	0	0	0.0	0.0
Tuticorin	9372	476	10129	508	5044	252	5444	278	8.1	6.7	7.9	10.3
Cochin	4607	335	4785	346	2456	178	2713	187	3.9	3.3	10.5	5.1
New Mangalore	692	48	747	50	367	25	493	34	7.9	4.2	34.3	36.0
Mormugao	258	20	235	19	112	10	110	11	-8.9	-5.0	-1.8	10.0
J. L. Nehru	57911	4259	55234	4162	27169	2061	28974	2233	-4.6	-2.3	6.6	8.3
Mumbai	829	58	450	40	216	19	291	24	-45.7	-31.0	34.7	26.3
Kandla	1935	118	452	29	452	29	0	0	-76.6	-75.4	-	-
All Ports	**119866**	**7714**	**114641**	**7456**	**57834**	**3763**	**60639**	**4009**	**-4.4**	**-3.3**	**4.9**	**6.5**

Note: CP - Corresponding period of previous year. (P) Provisional; Tn: tonnes; TEU ï Twenty foot Equivalent Units

1.4.9 Container traffic (in million tonnes) which reflects largely trade in manufactures and components has shown improvement. Container traffic in 2014-15 (April-September) increased by 4.9%. In terms of Twenty Foot Equivalent Units (TEUs), containers handled by Major Ports in 2014-15 (April-September) exhibited a growth of 6.5% compared to negative growth of 4.5% in 2013-14. Amongst the major ports, the ports at Kandla, HDC, Paradip, Vishakhpatnam and Mormugao witnessed fall in container traffic. Jawahar Lal Nehru Port continues to be the leading container handling port in the country with a share of 47.8% in terms of tonnage and 55.7% in terms of TEUs in the total container traffic at major ports (**Table 6**). Chennai port which handled 25% of container cargo is the second largest container handling port.

Efficiency in container handling operations at some of the select container terminals in India is given in **Table 7.**

Table 7: Performance Indicators of Select Container Terminals

Terminal	Year	Moves / Crane Hr.	Moves / Berth Hr.	TEU /Mtr. Quay	TEU / Employee	Dwell Time(Day)	TRT Day
1	2	3	4	5	6	7	8
Tuticorin	2012-13	23	45	1284	3446	1.3	1.1
	2013-14	22	41	1371	3613	1.1	1.1
April-Sept.	2014-15(P)	22	45	644	1730	1.4	1.1
Chennai - CCTPL	2012-13	23.8	50.8	996.6	2151	2.4	2.6
	2013-14	26.5	59.9	830.6	1793	2.3	2.2
April-Sept.	2014-15(P)	23	46	556	1240	2.5	1.4
Chennai - CITPL	2012-13	30	60.3	787.5	3360	3.5	0.04
	2013-14	30	66.7	878	3305	3.5	0.04
April-Sept.	2014-15(P)	30	33	373	1592	3.5	0.04
JNPT - JNPCT	2012-13	16.9	51.9	17.0	1291	3.8	1.9
	2013-14	17.5	62.1	18.5	1402	3.3	1.6
April-Sept.	2013-14(P)	17.7	62.5	18.0	NA	2.8	1.51
	2014-15(P)	16.8	60.7	19.0	NA	3.7	1.79
JNPT - NSICT	2012-13	21.2	69.8	1740.1	NA	2.4	NA
	2013-14	20.8	67.8	1615.8	NA	1.6	NA
April-Sept.	2013-14(P)	21.3	68.9	769.7	NA	1.3	NA
	2014-15(P)	21.8	71.1	933.3	NA	2.3	NA
JNPT - GTICT	2012-13	30.5	107.7	2818.9	3974	3.1	NA
	2013-14	29.2	105.2	2639.8	3774	3	NA
April-Sept.	2013-14(P)	31.8	110.8	1347.3	1918.6	2.6	0.79
	2014-15(P)	25.2	92.8	1382.7	1973.0	3.8	1.22
Cochin	2012-13	26.4	48.2	46.1	96	7.0	12.8
	2013-14	27.1	40.1	47.7	101	6.0	14.8
April-Sept.	2013-14(P)	27.1	40.1	577.0	101	6.2	
	2014-15(P)	24.0	34.4	312.0	114	7.7	12.5
Visakhapatnam	2012-13	22.5	34.4	549.2	1030	3.7	NA
	2013-14	23.9	46.1	582.2	1092	3.2	NA

Moves /Crane Hour(Hr): Total container vessel moves/sum of gross craned Hours
Moves/Berth Hr: Total container vessel moves/sum of gross vessel working hours
TEU/Mtr. Quay: Total TEUs handled per annum / total quay length in meter
Dwell time: Total No. of container storage days/total no. containers
JNPCT: Jawaharlal Nehru Port Container Terminal NSICT: Nhava Sheva International Container Terminal
GTICT: Gateway Terminals India Container Terminal; TRT:Turn Around Time
CCTPL: Chennai Container Terminal Pvt. Ltd. CITPL: Chennai International Terminal Private Limited.

1.5 Cargo traffic at Non-Major Ports

1.5.1 Nonï major ports handled 44% of total maritime freight traffic of the country during April-September, 2014-15.

1.5.2 **Table 8** presents maritime state-wise share and growth of traffic handled at Non-major ports during the last few years and first six months of the current and previous year.

Table 8 : Traffic Handled by Non-Major Ports by Maritime States/UTs

Maritime State/UT	Traffic Handled ('000 Tonnes)					% Change over previous year	
	2011-12	2012-13	2013-14	April-September		2013-14	April-Sept.
				2013-14	2014-15		2014-15
Gujarat	259050	287817	309946	152606	164940	7.7	8.1
	(73.23)	(74.19)	(73.75)	(74.79)	(72.76)		
Maharashtra	19947	24198	24664	11284	12699	1.9	12.5
	(5.64)	(6.24)	(5.87)	(5.53)	(5.60)		
Andhra Pradesh	45633	51811	58699	28983	36656	13.3	26.5
	(12.90)	(13.36)	(13.97)	(14.20)	(16.17)		
Goa	14470	3389	3615	0	186	6.7	-
	(4.09)	(0.87)	(0.86)	(0.00)	(0.08)		
Tamil Nadu	1210	933	866	382	478	-7.2	25.1
	(0.34)	(0.24)	(0.21)	(0.19)	(0.21)		
Karnataka	592	610	509	206	276	-16.6	34.0
	(0.17)	(0.16)	(0.12)	(0.10)	(0.12)		
OtherStates/UTs	12843	19165	21940	10576	11459	14.5	8.3
	(3.63)	(4.94)	(5.22)	(5.18)	(5.05)		
All M.States/UTs	353745	387923	420239	204037	226694	8.3	11.1
	(100)	(100)	(100)	(100)	(100)		

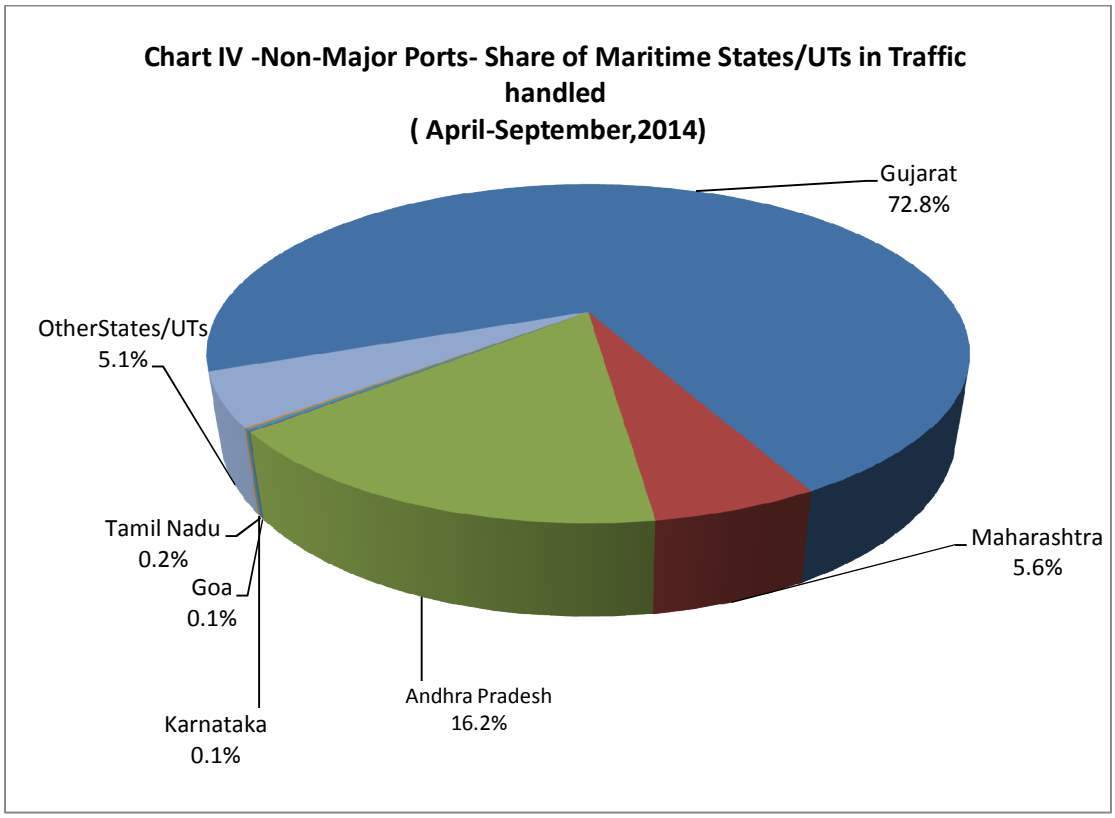
Note: Figure in parenthesis is the percentage share of traffic handled by the maritime state to the total traffic handled by all the maritime states; P Provisional

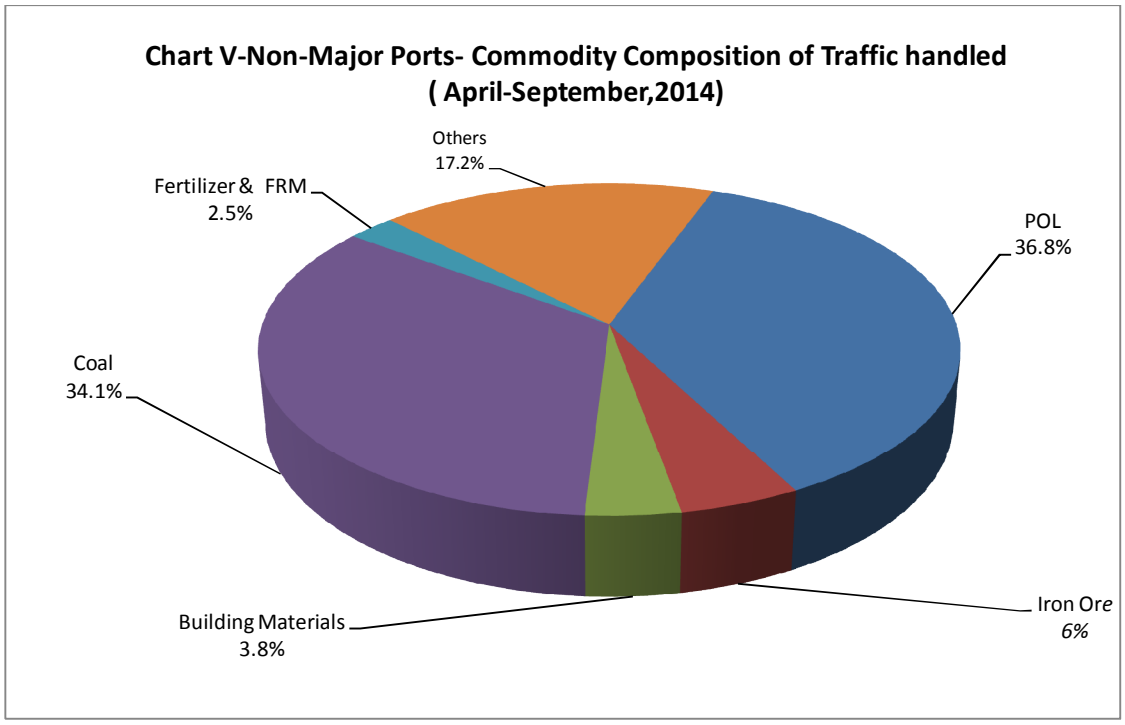
1.5.3 The growth in cargo handled by the non-major ports in 2013-14 was 8.3% compared to 9.7% recorded in 2012-13. During April-September, 2014-15 it was 11.1% compared to 10.2% recorded in April-September, 2013-14. The growth in quantum of cargo handled at non-major ports has been primarily driven by growth in non-major ports in Gujarat and Andhra Pradesh. (**Table 8)**. The growing importance of non-major ports in handling cargo traffic has helped alleviate the congestion at major ports. **Table 8** provides traffic handled by non-major ports in terms of maritime states (geographic location) and **Table 9** gives a glimpse of commodity profile of the cargo handled. The above table reflects that Gujarat accounted for (72.8%) of the traffic handled by the non-major ports followed by Andhra Pradesh (16.2%) Maharashtra (5.6%). Three maritime States, viz, Gujarat, Andhra Pradesh and Maharashtra together accounted for about 95% of the total cargo traffic handled by the non-major ports during April-September, 2014-15.

1.5.4 Two commodities, viz. POL and Coal accounted for more than 70% of the total cargo handled at the non-major ports (**Table 9**).

Table 9 : Commodity-wise Traffic Handled by Non-Major Ports							
Commodity Group GROUP	Traffic Handled ('000 Tonnes)					% Change over Previous Period	
	2011-12	2012-13	2013-14	April-September (P)		2013-14	April-September
				2013-14	2014-15		2014-15
POL	156322 (44.19)	168565 (43.45)	170453 (40.56)	84552 (41.44)	83332 (36.76)	1.1	-1.4
Iron Ore	30616 (8.65)	21855 (5.63)	22246 (5.29)	8396 (4.11)	10984 (4.85)	1.8	30.8
Building Materials	12866 (3.64)	11953 (3.08)	18864 (4.49)	5495 (2.69)	8620 (3.80)	57.8	56.9
Coal	79040 (22.34)	109264 (28.17)	125886 (29.96)	65127 (31.92)	77371 (34.13)	15.2	18.8
Fertilizer & FRM	15742 (4.45)	12548 (3.23)	10564 (2.51)	6636 (3.25)	5766 (2.54)	-15.8	-13.1
Others	59159 (16.72)	63738 (16.43)	72226 (17.19)	33831 (16.58)	40621 (17.92)	13.3	20.1
All	353745 (100)	387923 (100)	420239 (100)	204037 (100)	226694 (100)	8.3	11.1
Note: Figure in parenthesis is the percentage share of major commodity groups in the total traffic handled by the Non major ports.							

1.5.5 The share of Maritime States/UTs in the total traffic at non-major ports and Commodity-wise composition of traffic during April-September,2014-15 is depicted in the pie **Charts IV and V**.





POL : Petroleum, Oil & Lubricants FRM : Fertilizer Raw Material

1.5.6 Maritime State-wise & commodity-wise traffic handled at non-major ports during the last few years and first six months of the current and previous year is given in **Annex III**.

1.6 Impact of Global Macro Developments on Maritime Trade

1.6.1 Impact of growth on India's seaborne cargo

1.6.1.1 India's Maritime Transport growth is driven by developments in the world economy viz. growth in world output & trade as well as in Indian economy. Thus volume of seaborne cargo traffic is essentially in the nature of derived demand and is mainly shaped by the levels and changes in both the global and domestic activity. During 2014-15(April-September) the GDP growth increased to 5.5% from 4.9% in 2013-14. Cargo traffic handled by India's 12 major ports (which accounts for 56% of India's total seaborne cargo) in the first six months (April-September) of 2014-15 was 288.48 million tonnes compared to 277.23 million tonnes during April-September of 2013-14 showing a growth of 4.1%. The growth in cargo traffic during April-Sept., 2013-14 over the corresponding period of 2012-13 was, however, 2.3% only. The trajectory of growth in cargo handled at India's major ports comes into sharp focus when these growth rates are viewed in terms of quarterly growth trajectories. This reveals that growth in total cargo throughput at Major Ports was negative in first quarter of 2013-14, but it picked-up thereafter from second

quarter of 2013-14. The Industry sector which is a major factor influencing seaborne container cargo traffic posted a higher GDP growth of 3.2% in H1 (April-Sept.) of 2014-15 as compared to 1.1% in H1 (April-September) of 2013-14. GDP of Industry sector recorded quarterly growth of -0.4% in Q1 and 2.6% in Q2 during the 2013-14. While trends in POL, coal and fertilizers are largely driven by the dynamics of domestic demand supply; those of iron ore, container traffic, ñothersò in particular are largely shaped by the state of global demand and economic activity. Coal which is imported to meet the demand of power and steel sector was the only commodity posting Quarterly non-negative growth in first half of 2013-14 & 2014-15. The impact of global demand was pronounced in case of container traffic, which reflects negative growth in trade in manufactures in H1 of 2013-14. During the period of (April-September, 2014-15) container traffic has shown positive growth of 4.9%. Iron ore cargo traffic which picked-up in the second quarter of 2013-14 has again declined in the Q2 of 2014-15. The growth in Iron Ore traffic, in the first quarter of 2014-15 at 4.4% slipped to a negative growth of 42.6% in the second quarter of 2014-15. ôOther commodityôgroup recorded a growth of 14.4% in the first half of 2014-15. In the first two quarters of 2014-15, the growth has been 15.3% and 13.5 % respectively.

1.6.1.2 **Table 10** gives Quarter wise trend in growth of cargo traffic handled at Major ports, GDP and GDP of Industry sector during Q1 and Q2 and Half yearly growth of 2013-14 and 2014-15.

Table 10 : Quarter wise Trend in Growth of Cargo Traffic at Major Ports & GDP

Commodities/ Year	2013-14			2014-15		
	Q1	Q2	Half-yearly Growth	Q1	Q2	Half-yearly Growth
POL	5.0	2.7	3.9	-0.4	-0.2	-0.3
Iron Ore	-61.5	37.1	-34.1	4.4	-42.6	-22.8
Coal	33.1	24.6	29.0	0.0	12.4	5.8
Fertilizer	15.1	-26.0	-12.1	20.8	11.0	15.3
Container (in tonnes)	-6.6	-3.4	-5.0	3.6	6.1	4.9
TEUs	-4.3	-4.7	-4.5	4.0	8.9	6.5
Other cargo	-3.0	7.6	2.1	15.3	13.5	14.4
All Cargo	-0.9	5.7	2.3	4.1	4.3	4.2
GDP overall	4.7	5.2	4.9	5.7	5.3	5.5
GDP -Industry	-0.4	2.6	1.1	4.2	2.2	3.2
GDP: Gross Domestic Product at factor cost at 2004-05 prices.						

1.6.2 Global Ocean Freight Rates

Freight Rates

After five years of economic downturn, 2013 was marked by another gloomy and volatile maritime freight rate market. Indeed, all shipping segments suffered substantially, with freight rates in dry bulk and tanker markets reaching a 10-year low in 2013 and similarly low levels in the container-liner market. The general causes of freight ratesô low performance remain, as in previous years, the result of a poor world economic development, weak or hesitant demand and persistent overcapacity from the supply side in the global shipping market.

Container freight rates

The container-ship market was tense throughout 2013, with freight rates remaining volatile and struggling to rise. Overall the sector fundamentals were slightly unbalanced, leading to low freight rates and low returns with which carriers had to struggle throughout the year. Overall global demand for containers transported by sea witnessed a growth estimated at 4.7 per cent in 2013 compared to 3.2 per cent in 2012. This global growth in demand was matched by a slight deceleration in growth of global container supply that was 4.7 per cent in 2013 compared to 4.9 per cent in 2012. The growth in container demand, which was observed in most trade routes did not have an impact on freight rates as they remained historically weak and volatile. This is an indication that structural oversupply pertained, with the majority of trade lanes being oversupplied with tonnage. The delivery of new container ships in 2013, mainly dominated by large Post-panamax vessels of 8,000+ TEU capacities, did not help reverse the tendency. Average freight rates on most trade lanes remained low and significantly below those of 2012. Despite better economic prospects and an increase in freight rates at the beginning of 2014, the market is expected to remain under pressure because of the persistent mismatch between supply capacity and demand. Freight rates on individual routes will therefore continue to be determined by the way supply capacity management will be handled.

Tanker freight rates

Freight rates in the tanker segment remained weak in 2013, reaching historically low levels in both crude and products sectors reflected in Table 11, the Baltic Exchange Tanker Indices maintained their downtrend since 2009. The average Dirty Tanker Index declined to 645 points in 2013 compared to 720 in 2012, representing a drop of 10.42 per cent. The average Baltic Clean Tanker Index reached 607 points in 2013 compared to 643 in 2012, a 5.6 per cent drop compared to the 2012 annual average. This decline was mainly due to

the lack of equilibrium in the tanker market conditions, which continued to suffer from a relatively soft demand and a massive oversupply of vessels. These trends are reflected in **Table 11**.

Table 11 - Baltic Exchange Rate Index

	2008	2009	2010	2011	2012	2013	%age Change (2013/ 2012)	2014 (Estimate)
Dirty Tanker Index	1 510	581	896	782	720	645	-10	638
Clean Tanker Index	1155	485	732	721	643	607	-6	649

In the near foreseeable future, as for container shipping, it is likely that the tanker market rates will remain threatened by the imbalance between supply and demand. Changing trade dynamics, longer travel distances and scrapping could potentially absorb the increasing inflow of vessels. However, fleet growth is still expected to outpace tonnage demand. Consequently, the market will remain under pressure in 2014 as a result of overcapacity, whereas 2015 may see some market balance improvement.

Dry Bulk Freight Rates

Similar to other shipping segments, a weak demand, the depressed world economic situation, and oversupply of tonnage continue to control the drybulk freight rates. Nevertheless, the year 2013 can be divided into two phases. The Baltic Dry Index, which started the year at 771 points, remained very low during the first six months with a six-month average of 843 points and reaching its lowest level at 745 points in February. However, over the second half of the year, as for oil tankers, the bulk market witnessed noticeable increases in freight rates with the December index reaching 2178 points, leading to an average index of 1214 points for the year compared to an average of 918 points for 2012. Average earnings in all bulk carrier sectors remained relatively weak in 2013 although slightly higher than in 2012, due mainly to the improvements in Capesize spot earnings in the second half of the year. With earnings averaging $7,731 per day in 2013, bulk carriers in general had to struggle to cover typical operating expenses. The overall low earnings continued to push owners to keep operating their fleets at slower speeds.

1.6.3 Trends in Global Top 20 Cargo/Container Ports

1.6.3.1 Growth in cargo and container traffic at world's top major ports/container terminals is a barometer of trends in seaborne trade. The growth in cargo traffic (million tonnes) at world's top 20 ports was higher at 7.0 % in 2013 as compared to 4.9% in 2012.

Similarly, the growth in container traffic (million TEUs) was 3.8 % in 2013 as compared to 3.7% in 2012.

Recent trends in Top 20 World Major Ports (in Million Tonnes) and Container Ports (in million TEUs) are given in **Table 12** and **Table 13** respectively.

Table 12 - Top 20 World Major Ports (in Million Tonnes)

S.No.	Port	2011	2012	2013
1	Ningbo & Zhoushan (PRC)	691	744	809.8
2	Shanghai (PRC)	727.6	736	776
3	Singapore	531.2	538	560.9
4	Tianjin (PRC)	451	476	500.6
5	Guangzhou (PRC)	429	434	454.7
6	Qindao(PRC)	375	402	450
7	Tangshan (PRC)	308	364.6	446.2
8	Rotterdam(Netherlands)	434.6	441.5	440.5
9	Dalian(PRC)	338	373	408.4
10	Yingkou(PRC)	261	301.1	330
11	Rizhao (PRC)	252.6	281	309.2
12	Port Hedland (Australia)	199	246.7	288.4
13	Hong Kong 1)	277.4	269.3	276.1
14	Qinhuangdao(PRC)	287	271.5	272.6
15	Busan 2)	269.9	270.9	260
16	Shenzen (PRC)	223	228.1	234
17	Xiamen(China)	156.5	172	191
18	Antwerp (Belgium)	187.2	184.1	190.8
19	South Louisiana(USA)	170.4	161.9	187.8
20	Port Klang (Malaysia) 2)	148.9	151.7	152
	Total of Top 20 Ports	**6718.3**	**7047.4**	**7539**

Source: Port Statistics, Port of Rotterdam Authority;
PRC: Peoples Republic of China;
: 1) Including river trade, 2) Converted from freight ton to metric ton

Table 13 - Top 20 World Container Ports (in Million TEUs)

S.No.	Port	2011	2012	2013
1	Shanghai (PRC)	31.74	32.53	36.62
2	Singapore	29.94	31.65	32.6
3	Shenzhen (PRC)	22.57	22.94	23.28
4	Hong Kong (PRC)1)	24.22	23.12	22.35
5	Busan (Republic Korea)	16.19	17.04	17.69
6	Zhoushan/Ningbo 3)(PRC)	14.69	15.7	17.35
7	Qingdao(PRC)	13.02	14.6	15.52
8	Guangzhou(PRC)	14.4	14.7	15.31
9	Dubai Ports (UAE)	13	13.28	13.64
10	Tianjin(PRC)	11.5	12.3	13.0
11	Rotterdam (Netherlands)	11.89	11.87	11.62
12	Port Klang (Malaysia)	9.6	10.0	10.35
13	Dalian(PRC)	6.4	8.06	10.01
14	Kaohsiung (Taiwan Province of PRC)	9.64	9.78	9.94
15	Hamburg (Germany)	9.01	8.86	9.26
16	Antwerpen (Belgium)	8.66	8.64	8.58
17	Xiamen(PRC)	6.47	7.2	8.01
18	Tanjung Pelepas (Malaysia)	7.5	7.7	7.62
19	Jakarta(Indonesia)	5.65	6.2	6.17
20	Los Angles (USA)	7.94	8.08	6.15
	Total of Top 20 Ports	**274.03**	**284.25**	**295.07**

Source: Port Statistics, Port of Rotterdam Authority;
PRC: Peoples Republic of China;
All China Ports including domestic trade and river trade; 1) Including river trade

1.7 Policy Initiatives - Central Government

1.7.1 In October 1996, the then Ministry of Surface Transport issued guidelines for Private Sector participation in Major Ports. The guidelines were intended to precisely define the options for the involvement of private sector in the Major Ports.

1.7.2 Government also issued guidelines on joint venture formation in Major Ports which came into effect from 1.9.2000. In order to attract private sector investment, model bid documents were finalised for private sector projects laying down transparent bidding procedure, qualifications and selection criteria, bid evaluation procedure, termination payment, dispute resolution process etc. and detailed terms and conditions of the License Agreement, to ensure bankability, uniformity and reduction in time taken to select the private parties.

1.7.3 The Major Port Trust Act, 1963 was further amended in the year 2000 for allowing Major Ports to form joint ventures with Non-Major/Foreign Ports as well as companies.

1.7.4 Measures for increasing the capacity of Major Ports which are under the control of Central Government are taken as part of an ongoing process, keeping in view the demands of maritime trade through implementation of development plans for the ports, improvement in productivity, etc. At the end of March 2014 the cargo handling capacity of Major Ports was 800.52 Million Tonnes. Commodity-wise capacity of Major Ports at the end of March 2009 to 2014 is given in **Annex IV.**

Maritime Agenda 2010-20

1.7.5 In the Maritime Agenda a target of 3130 MT Port capacity has been set for the year 2020. More than 50% of this capacity is to be created in the Non-Major Ports. The Non-Major Ports are expected to play a major role and by the year 2020, the traffic handled by Non-Major Ports is expected to increase to 1280 Million Tonnes (MT). The objective is not only creating more capacity but to bring out ports at par with the best international Ports in terms of performance. This will reduce the transaction cost considerably for our trade, thus making them globally competitive. The total proposed investment in Major and Non-Major Ports by 2020 is expected to be around Rs.2,96,000 crore. Most of this investment

has to come from the private sector. Public Funds will be mainly deployed for common user infrastructure facilities like deepening of port channels, rail and road connectivity from ports to hinterland etc. Foreign Direct Investment up to 100% under automatic route is permitted for construction and maintenance of Ports.

The Ministry of Shipping is continuously engaged in designing and implementing various projects for development of port sector. To increase the pace of growth and to improve the efficiency of the delivery system, the Ministry of Shipping has come out with a Maritime Agenda 2010-20 for the next ten years. The Agenda is an effort to identify the areas for attention during 2010-11 to 2019-20.

1.7.6 The agenda for the Ports are:-

- Develop Two New Major Ports one each on east and west coasts.
- Full mechanization of cargo handling and movement
- Major Ports to have draft of not less than 14 metres and hub ports 17 metres.
- Identification and implementation of projects for rail, road and inland waterway connectivity to ports.
- Development of two hub ports on each of the West and the East coasts
- **Port Policy Measure**
    - New Land Policy for Major Ports
    - New Policy on captive berths
    - New Policy on dredging
    - Shifting of transshipment of Indian containers from foreign ports to Indian ports.
    - Policy on co-operation and competition amongst Indian Ports
    - Establishing ôIndian Ports Globalô for overseas investments by Indian Ports.
    - Development of two non-major ports, one at Dugarajapatnam in Andhra Pradesh and other in Sagar, West Bengal.

Private Sector Participation

1.7.7 With opening up of the Indian economy, the Government of India has allowed private sector participation in Major Ports to infuse funds, induct latest technology, improved management practices and above all addition of capacity. Foreign direct investment upto 100% under automatic route is permitted for construction and maintenance of Ports and Harbours. Maritime States have also identified projects for development of non-major ports for creation of additional capacity. Private sector is envisaged to fund most of the projects through PPP or BOT or BOOT basis. It is

envisaged that private sector will mainly contribute towards the cost of development of ports in India.

1.7.8 To encourage private sector participation uniformity, clarity and transparency in the bidding process is of the prime importance. The Department of Shipping has already put in place guidelines for private sector participation. To ensure uniformity in short listing and bidding Model RFQ and RFP documents have been finalized. A Model Concession Agreement has also been finalized which attempts to bring in uniformity to the agreements to be signed by the Major Ports as Concessioning Authority with the various private operators as concessionaire. During the year 2013-14, 16 Public Private Partnership (PPP) projects were awarded at an estimated cost of Rs. 18640.83 crore for capacity addition of 159.65 MT in the major ports comprising construction of berths and terminals, mechanization of existing berths etc.

1.7.9 The preferred route for private sector participation is through open competitive bidding in which the bidder offering the highest percentage of revenue share out of the operation of the facility which is licensed out is selected. The tariff fixation is carried out by TAMP which is an independent Regulatory Body. At present the tariffs are fixed upfront which act as a ceiling before a project is bidded out on revenue share basis as explained above. The private operators are free to charge below the ceiling.

Areas of private investment

1.7.10 The following areas which are indicative in nature have been identified for participation/investment by private sector:-

(a) Leasing out existing assets of the Port.

(b) Construction/creation of additional assets, such as:

- construction and operation of container terminals.
- construction and operation of bulk, break bulk, multipurpose and specialized cargo berths.
- warehousing, container freight stations, storage facilities and tank farms.
- cranage/handling equipment.
- setting up of captive power plants.
- dry docking and ship repair facilities.

(c) Leasing of equipment for port handling and leasing of floating crafts from the private sector.

(d) Pilotage.

(e) Captive facilities for port based industries.

National Transport Development Policy Committee (NTDPC)

1.7.11 The Government of India had constituted National Transport Development Policy Committee (NTDPC) in 2010 under the Chairmanship of Dr. Rakesh Mohan to formulate a long term Transport Policy. The Committee has inter-alia made several recommendations for Port Sector with the intent to provide a long term direction to the future development and governance of Indian ports and to incentivise and integrate water based transport for it to play an increasing role in the national transport network. Key recommendations of the Committee are:

a) Strategic view on port investment

(i) Mega ports

A key government priority should be to invest in 4 to 6 Mega ports over the next 20 years, with 2 to 3 on each coast to substantially cater to our foreign trade and the estimated requirement of raw material imports and exports by 2030. These mega ports can be established either by transforming some of the existing major (or non-major) ports into mega ports, if feasible, by combining some major and minor ports, or by setting up totally new mega ports. The location of the proposed mega ports should be harmonised with plans for the NHDP as well as with the upcoming and future DFCs.

An expert group needs to be expeditiously set up to study and identify potential locations for development of these mega ports.

(ii) Drafts

In order for major ports to accommodate larger mother vessels going forward, the draft at major ports needs to be increased to at least 17 meters, by the first half of XIII Plan. The associated incremental capital dredging at most of the ports would require continued Govt. support.

b) Strategic Institutional shift – Landlord model of port governance

- The ports in India, essentially the major-ports, widely follow a hybrid format of the long obsolete service port model and the preferred landlord model. The hybrid approach has resulted in a conflict of interest between the port trusts and the private sector.

- There is immediate need to make appropriate legislative and policy changes to expedite the move to the landlord model and to transform the port trusts to statutory landlord port authorities through specific legislation. All the terminal operations of port trusts would need to be corporatized as public sector corporations. Then, both private- and corporatized public-sector terminal operators would compete under the aegis of the landlord port authority. The corporatized public sector terminal operators could potentially be disinvested, listed, and possibly privatised at a later stage. The landlord port authority would carry out all public sector services and operations such as the award of bids for containers and other terminals, dredging etc.

- Any progressive regulatory shift should attempt to bring in the cooperation and participation of maritime states.

- New Land Policy Guidelines have since been issued in January, 2014. These guidelines provide an open and transparent framework for managing Port Lands. The Policy will ensure that land resources of the Ports are put to optimum use and all leasing of port lands is done through a transparent tender-cum-auction methodology. This has brought in accountability and minimized the element of discretion and arbitrariness at port level.

c) Role of TAMP

The existing tariff guidelines followed by Tariff Authority for Major Ports (TAMP) was constraining the growth of the Major Ports. The Tariff regime has now been rationalized by allowing the PPP operators at Major Ports to fix their own tariff based on market realities. Tariff hikes have been allowed based on achievement of performance standards. This has enthused the industry and the investors, which is reflected in the renewed interest shown by all big majors in port PPP Projects.

d) Coastal Shipping

With a view to promote coastal shipping, the Ministry of Shipping has taken a set of policy initiatives. One such initiative is to have a Green Channel clearance for cargo in major Ports as coastal cargo does not require customs clearance and only information needs to be filed with the customs. Presently because of lack of exclusive berth, storage area and gates for coastal cargo in the ports, there is considerable delay in

clearance of these cargoes. The Ministry has given a policy directive to all the major ports to have exclusive berths with associated storage space and separate gates for coastal cargo. As per the directive issued on 21.7.2014 all the Major Ports are required to identify suitable infrastructure so that Green Channel clearance for coastal cargo can be made operational within the next 12 months. In the meanwhile Green Channel clearance has already become operational in Kandla and Mumbai Ports.

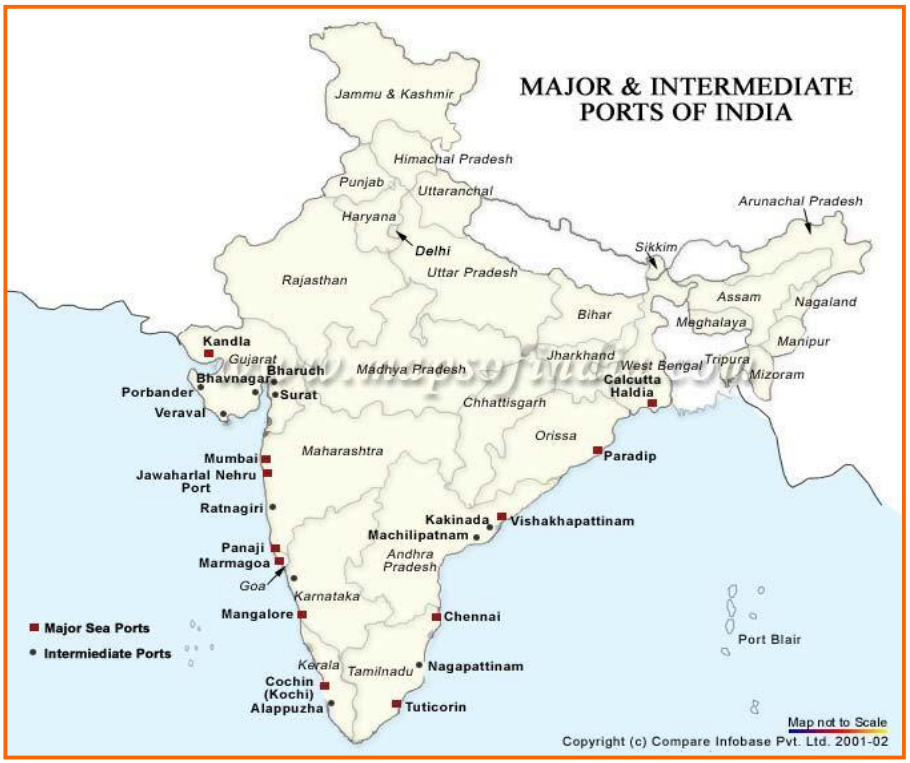
e) Sagarmala Project

Ministry of Shipping is the nodal point for the Sagarmala Project which aims at Port-led development and also to connect all the coastal cities through road, rail, port and airports. A consultation session was held on 30th September, 2014 with 45 stakeholders representing the Ministry of Railways, Road Transport & Highways, DIPP, Planning Commission, Customs, Major and Minor Ports, State Maritime Boards, Asian Development Bank, Confederation of Indian Industry, Federation of Indian, Chambers of Commerce and Industry, Indian National Ship OwnersôAssociation and ICCSA. At the conference, institutional arrangements for implementation of Sagarmala as also the need for legislative framework to implement the Sagarmala concept was deliberated. On the basis of the inputs given by the participant at the conference the Sagarmala concept is expected to be finalized soon. .

2. POLICY AND PERFORMANCE OF MARITIME STATES

2.1 Ports are economic and service provision units of a remarkable importance since they act as a place for the interchange of two transport modes, maritime and land, whether by rail or road. Therefore, the essential aspect of ports lies in their intermodal nature. India has a coast-line of over 7500 Kms with 12 major ports and 200 notified non-major (minor/intermediate) ports along the coast-line and sea-islands. These 200 Non-major ports are located in Gujarat (41), Maharashtra (48), Goa (5), Daman & Diu (2), Karnataka (11), Kerala (17), Lakshdweep (10), Tamilnadu (15), Puducherry (2), Andhra Pradesh (12), Orissa (13), West Bengal (1) and Andaman & Nicobar Island (23). Out of these 200 Non-major ports, only some ports are well developed and provide all-weather berthing facilities for cargo handling. In 2013-14, only 61 Non-major Ports were reported to have handled cargo traffic. **Chart-VI** gives the geographical location of the Major and prime Non-Major Ports. The Maritime Ports operate within the statutory framework of the Indian Ports Act 1908 which applies to all the ports. However, the Major Ports Act 1963 applies only to Major Ports. Each Major Port is administered by a 'Port Trust' except for the port of Ennore which is a corporatised entity.

Chart - VI



Source:http://www.mapsofindia.com

2.2 The Major Ports are under the purview of the Centre while the Non-Major Ports are under the purview of the States. Port development in the Central Sector has emphasized additions to capacity as well as provision of commodity specific handling facilities (at Major Ports) as per the Plan Schemes. With the liberalization of the economy, private sector participation in development of Major Ports has been encouraged. The Maritime States are also actively pursuing the development of Non-Major Ports to meet the growing needs of the sea borne trade.

2.3 Maritime States Development Council (MSDC)

2.3.1 With a view to have an integrated approach for the development of both Major and Non-Major Ports, the **Maritime States Development Council (MSDC)** was constituted in May, 1997 under the Chairmanship of the Hon'ble Minister of Shipping. The Ministers in-charge of Ports in all Maritime States, Union Territories of Puducherry, Andaman & Nicobar Administration, Daman & Diu and Lakshadweep are its members. The deliberations and decisions of the MSDC provide the institutional framework for coordinated development of Major and Non- Major ports. So far fourteen meetings of MSDC have been held.

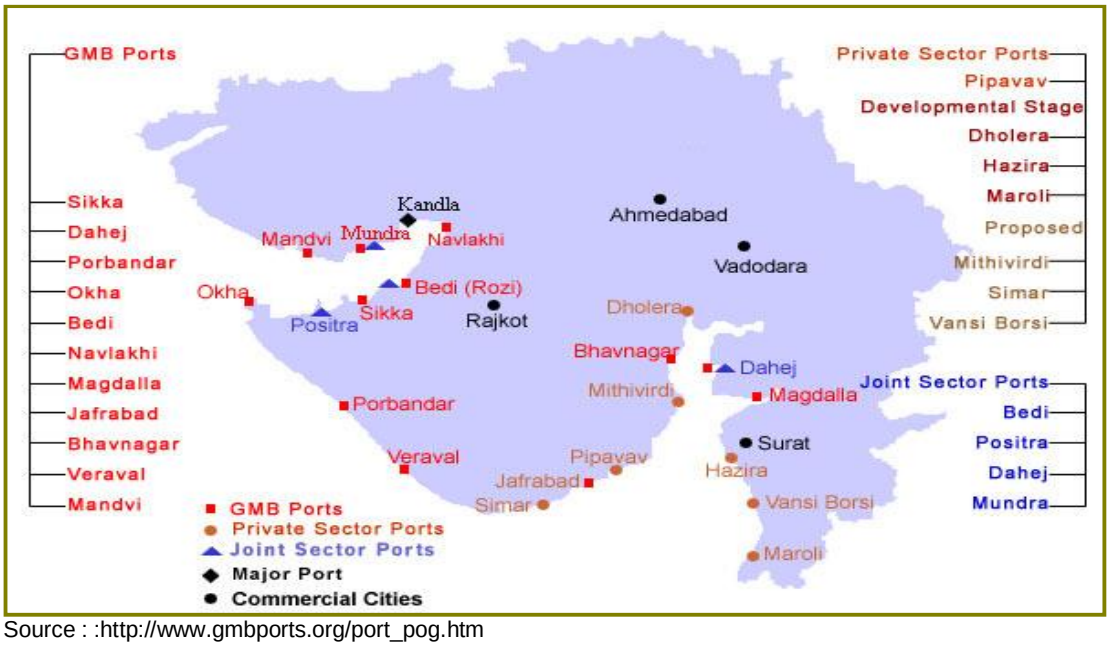
2.4 Maritime States – Non-Major Ports

Non-major ports in India collectively handled 226.69 million tonnes of traffic during April-September 2014-15 as compared to 204.04 million tonnes of cargo handled in the corresponding period of 2013-14.

2.4.1 GUJARAT

2.4.1.1 The state of Gujarat is endowed with 1215 km length of coastline which constitutes about one-sixth of the total Indian coastline. Out of 42 ports located along its coastline, 41 are non major ports while one port, viz. Kandla is a major port. Out of 41 non-major ports, 17 non-major ports in the State are handling cargo. The remaining 24 non-major ports are used for fishing activities and have traffic only of small volume. A snap view of the location of ports in Gujarat is given in **Chart –VII**.

Chart – VII: Gujarat: Major and Minor Ports



Source : :http://www.gmbports.org/port_pog.htm

2.4.1.2 The trends in the cargo handled at both major and non-major ports of the State during the last few years and first six months of the current and previous year are given in **Table 14**.

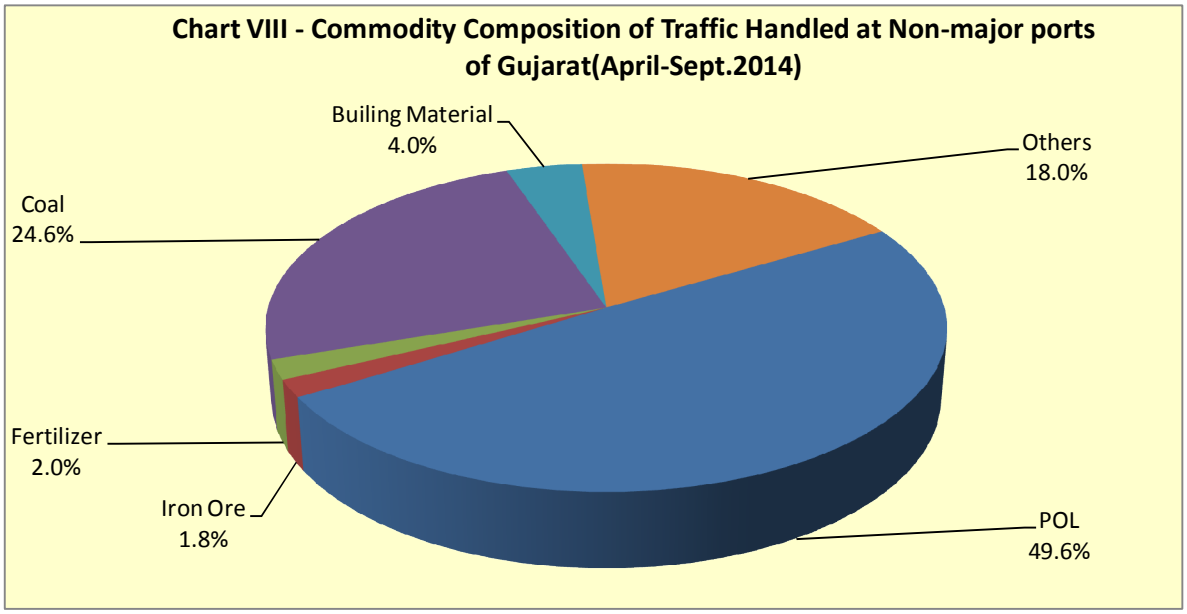
Table 14 - Gujarat: Trends in Cargo Handled at Major & Non-Major Ports (MillionTonnes)

Major/Non-Major	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14(P)	April-September	
								2013-14(P)	2014-15(P)
Major Ports	64.92	72.22 (11.2)	79.50 (10.1)	81.88 (3.0)	82.50 (0.8)	93.62 (13.5)	87.01 -(7.1)	45.95	46.54 (1.3)
Non-Major Ports	150.52	152.8 (1.5)	205.58 (34.5)	230.91 (12.3)	259.05 (12.2)	287.82 (11.1)	309.95 (7.7)	152.61	164.94 (8.1)
All Ports	215.44	225.03 (4.5)	285.08 (26.7)	312.79 (9.7)	341.55 (9.2)	381.44 (11.7)	396.96 (4.1)	198.56	211.48 (6.5)

Figures in bracket represents percentage change over the previous year/period.
(P) Provisional

2.4.1.3 It is noteworthy that all ports (major and non-major) located along the coast of Gujarat handled more than 41% of the total cargo handled by Indian ports in first six month of 2014-15. The total cargo traffic handled at the major and non-major ports of Gujarat during first six months of 2014-15 was of the order of 211.48 million tonnes as against 198.56 million tonnes in 2013-14, reflecting an increase of 6.5%. In particular, non-major ports of Gujarat alone handled close to three-fourth of total cargo traffic at India's non-major ports during the period under reference.

2.4.1.4 Amongst the Maritime States of India, Gujarat is one of the States, which has played a proactive role in the development of non major ports on its coastline. The share of commodity-wise traffic handled by non-major ports of Gujarat is shown in **Chart VIII.**



2.4.1.5 Recent trends in cargo handled and capacity creation in non -major ports of Gujarat are captured in the **Table 15**. It indicates sustained increase in cargo throughput and capacity addition. During the year 2013-14, 21 million tonnes of capacity was added taking the total cargo handling capacity in the non- major port sector in the Gujarat to 387 million tonnes. Gujarat Maritime Board (GMB) is the nodal agency for regulation and development of the Stateôs maritime activities.

Table 15 - Gujarat: Non Major Ports - Current Capacity & Utilization (Million Tonnes)

Item	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14(P)
Capacity*	197	235 (19.3)	244 (3.7)	267 (9.8)	323 (20.8)	366 (13.3)	387 (5.7)
Cargo Handled	150.52	152.81	205.58	230.91	259.04	287.82	309.95
% Utilization	74.92	64.89	84.36	86.35	80.2	78.6	80.1
* Including Lighter age Port Capacity; Figures within parenthesis indicate capacity addition in % age during the year							

2.4.1.6 As per the port policy, Gujarat Maritime Board (GMB) has selected 11 Green Field sites for development of new ports as ñAll weather Deep Water Direct Berthing Portsò. Amongst 11 ports, 6 ports are to be developed through private investment and remaining 4 ports in the joint sector.

2.4.2 MAHARASHTRA

2.4.2.1 The State has a coastline of around 653 km, with 2 major ports viz. Mumbai and Jawahar Lal Nehru and 48 non-major ports. Out of 48 non-major ports only 12 handle cargo. Maharashtra Maritime Board (MMB) is the nodal agency for regulation and development of the State's maritime activities.

The trends in the cargo handled at both major and non-major ports of the State during the last few years and first six months of the current and previous year are given in **Table 16.**

Table 16 - Maharashtra: Cargo Handled at Major & Non-Major Ports (Million Tonnes)

Major/Non-Major	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	April-September	
								2013-14 (P)	2014-15(P)
Major Ports	112.88	109.18 -(3.3)	115.30 (5.6)	118.90 (3.1)	121.92 (2.5)	122.53 (0.5)	121.52 -(0.8)	58.51	62.14 (6.2)
Non-Major Ports	11.36	10.42 -(8.3)	12.05 (15.6)	14.88 (23.5)	19.95 (34.1)	24.20 (21.3)	24.66 (1.9)	11.28	12.70 (12.5)
All Ports	124.24	119.60 -(3.7)	127.35 (6.5)	133.78 (5.0)	141.87 (6.0)	146.73 (3.4)	146.18 -(0.4)	69.79	74.84 (7.2)

Figures in bracket represent percentage change over the previous year/period. P- Provisional

2.4.3 GOA

2.4.3.1 Goa with a coastline of about 118 kms. is criss-crossed by 7 rivers. Apart from the major port at Mormugao, there are five non-major ports all of which are riverine ports with an average depth of about 2 meters except Panaji (which is the lone cargo handling non-major port) with a depth of 4 meters.

The trends in the cargo handled at both major and non-major ports of the State during the last few years and first six months of the current and previous year are given in **Table17.**

Table 17: Goa : Trends in Cargo Handled at Major & Non-Major Ports (MillionTonnes)

Major/Non-Major	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14(P)	April-September	
								2013-14(P)	2014-15(P)
Major Ports	35.13	41.68 (18.6)	48.85 (17.2)	50.06 (2.5)	39.05 -(22.0)	17.74 -(54.6)	11.74 -(33.8)	5.16	6.31 (22.2)
Non-Major Ports	12.83	11.90 -(7.2)	13.90 (16.8)	14.58 (4.9)	14.47 -(0.8)	3.39 -(76.6)	3.61 (6.5)	0	0.19 -
All Ports	47.96	53.58 (11.7)	62.75 (17.1)	64.64 (3.0)	53.52 -(17.2)	21.13 -(60.5)	15.35 -(27.4)	5.16	6.49 (25.8)

Figures in bracket represents percentage change over the previous year/period.
(P) Provisional.

2.4.4 KARNATAKA

2.4.4.1 Karnataka has a coastline of about 280 kms. At present, there is one major sea port, the New Mangalore Port and 11 non-major ports in Karnataka. The ports of Karwar, Mangalore, Tadri, Haldipur and Belakari are main cargo handling non-major ports in the state. During April-September, 2014-15, non- major ports in the State handled 0.28 million tonnes of cargo traffic as compared to 0.21 million tonnes in 2013-14 reflecting an increase of 34% over the corresponding period of previous year.

2.4.4.2 The trends in the cargo handled at both major and non-major ports of the State during the last few years and first six months of the current and previous year are given in **Table 18.**

Table 18 - Karnataka: Trends in Cargo Handled at Major & Non-Major Ports (Million Tonnes)

Major/Non-Major	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14(P)	April-September	
								2013-14(P)	2014-15(P)
Major Ports	36.02	36.69 (1.9)	35.53 -(3.2)	31.55 -(11.2)	32.94 (4.4)	37.04 (12.4)	39.37 (6.3)	19.38	18.23 -(5.9)
Non-Major Ports	8.90	4.97 -(44.2)	8.55 (72.0)	3.10 -(63.7)	0.59 -(81.0)	0.61 (3.4)	0.51 -(16.4)	0.21	0.28 (34.0)
All Ports	44.92	41.66 -(7.3)	44.08 (5.8)	34.65 -(21.4)	33.53 -(3.2)	37.65 (12.3)	39.88 (5.9)	19.58	18.51 -(5.5)

Figures in bracket represents percentage change over the previous year/period.
(P) Provisional.

2.4.5 KERALA

2.4.5.1 Kerala has a coastline of 570 kms, with one major port at Cochin and 17 other non-major ports. The Vallarpadam Container Terminal Project in Cochin has been promoted on BOT basis through public private participation.

2.4.5.2 The trends in the cargo handled at both major and non-major ports of the State during the last few years and first six months of the current and previous year are given in **Table 19**. In Kerala 4 ports, viz, Azhikkal, Beypore, Vizhinjam and Kollam are handling cargo for the last few years.

Table 19 - Kerala : Trends in Cargo Handled at Major & Non-Major Ports (Million Tonnes)

Major/Non-Major	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14(P)	April-September	
								2013-14(P)	2014-15(P)
Major Ports	15.81	15.5 -(2.0)	17.43 (12.5)	17.87 (2.5)	20.09 (12.4)	19.84 -(1.2)	20.89 (5.3)	10.85	11.36 (4.7)
Non-Major Ports	0.10	0.13 (30.0)	0.12 -(7.7)	0.12 (0.0)	0.10 -(16.7)	0.10 -(4.0)	0.10 (4.2)	0.04	0.06 (62.2)
All Ports	15.91	15.63 -(1.8)	17.55 (12.3)	17.99 (2.5)	20.19 (12.2)	19.94 -(1.3)	20.99 (5.3)	10.88	11.42 (4.9)

Figures in bracket represents percentage change over the previous year/period. (P) Provisional
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2.4.6 TAMIL NADU

2.4.6.1 Tamil Nadu has a coastline of about 906 km, with 3 major ports at Chennai, Ennore and Tuticorin and 15 non-major ports. Out of 15 non-major ports only 6 handled cargo. A Port Policy for promoting private investment for the development of minor ports in Tamil Nadu has been formulated. Its main objectives are to provide exclusive port facilities for import of Coal/Naphtha/Oil/Natural Gas for shore based thermal power plants, promote export oriented and port based industries along the coastal districts of Tamil Nadu, encourage ship-repairing, ship-breaking and manufacture of cranes and floating cranes. In addition, leisure tourism and water sports along the coastline are also aimed.

2.4.6.2 During April-September, 2014-15 the non-major ports in Tamil Nadu collectively handled 0.48 million tonnes of cargo traffic as compared to 0.38 million tonnes in the previous year. The trends in the cargo handled at both major and non-major ports of the State during the last few years and first six months of the current and previous year are given in **Table 20.**

Table 20 - Tamil Nadu: Trends in Cargo Handled at Major & Non-Major Ports (Million Tonnes)

Major/Non-Major	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14(P)	April-September	
								2013-14(P)	2014-15(P)
Major Ports	90.19	91 (0.9)	95.55 (5.0)	98.2 (2.8)	98.77 (0.6)	99.55 (0.8)	107.08 (7.6)	53.02	57.08 (7.7)
Non-Major Ports	0.89	0.90 (1.1)	1.17 (30.0)	1.61 (37.6)	1.21 -(24.8)	0.93 -(23.1)	0.87 -(6.9)	0.38	0.48 (25.1)
All Ports	91.08	91.9 (0.9)	96.72 (5.2)	99.81 (3.2)	99.98 (0.2)	100.48 (0.5)	107.95 (7.4)	53.40	57.56 (7.8)

Figures in bracket represents percentage change over the previous year/period.
(P) Provisional.

2.4.7 ANDHRA PRADESH

2.4.7.1 The State is bestowed with a coastline of about 974 kms. There is one major port viz Visakhapatnam and 12 non-major ports in Andhra Pradesh.

2.4.7.2 The State had prepared a perspective developmental plan, in its *VISION 2020 Document* for development of its ports with a view to enhance cargo handling capacity at its Non-Major Ports to around 173 million tonnes by 2020. As large investments are required for capacity creation, the State Government policy intends to encourage the participation of private sector in port development.

2.4.7.3 Non-major ports in Andhra Pradesh collectively handled 36.66 million tonnes of cargo during first six months of 2014-15 compared with 28.98 million tonnes in 2013-14 thus registering an increase of 26.5% in traffic. The trends in the cargo handled at both major and non-major ports of the State during the last few years and first six months of the current and previous year are given in **Table- 21.**

Table 21 - Andhra Pradesh: Trends in Cargo Handled at Major & Non-Major Ports (Million Tonnes)

Major/Non-Major	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14(P)	April-September	
								2013-14(P)	2014-15(P)
Major Ports	64.6	63.91	65.5	68.04	67.42	59.04	58.50	28.94	30.59
		-(1.1)	(2.5)	(3.9)	-(0.9)	-(12.4)	-(0.9)		(5.7)
Non-Major Ports	19.29	29.72	43.69	43.27	45.63	51.81	58.70	28.98	36.66
		(54.1)	(47.0)	-(1.0)	(5.5)	(13.5)	(13.3)		(26.5)
All Ports	83.89	93.63	109.19	111.31	113.05	110.85	117.20	57.92	67.25
		(11.6)	(16.6)	(1.9)	(1.6)	-(1.9)	(5.7)		(16.1)

Figures in bracket represents percentage change over the previous year/period.
(P) Provisional.

2.4.8 ORISSA

2.4.8.1 Orissa has a Coast line of 480 Kms. from Andhra Pradesh border in Ganjam District to West Bengal border in Balasore District. It is endowed with conducive, unique, natural and strategic port locations. The Government of Orissa has identified 14 potential sites for development of Minor Ports. To facilitate developers for development of Minor Ports, Government of Orissa has framed the Port Policy during the year 2004.

2.4.8.2 The advantages for development of sea ports in Orissa includes availability of a vast hinterland generating cargo, comprising of other developing Eastern and Central Indian States, mineral rich hinterland which offers long term potential for cargo which need seaport facility in Orissa. Paradip port is the only major port in the State under the control of Government of India which is packed to accommodate increasing traffic.

2.4.8.3 Non-major ports in Orissa collectively handled 7.84 million tonnes of cargo during April-September, 2014-15 compared with 6.53 million tonnes in 2013-14 thus registering an increase of 20.1% in traffic. The trends in the cargo handled at both major and non-major ports of the State during the last few years and first six months of the current and previous year are given in **Table 22**.

Table 22- Orissa : Trends in Cargo Handled at Major & Non-Major Ports (Million Tonnes)									
Major/Non-Major	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14(P)	April-September	
								2013-14(P)	2014-15(P)
Major Ports	42.44	46.41 (9.4)	57.01 (22.8)	56.04 -(1.7)	54.25 -(3.2)	56.55 (4.2)	68.00 (20.2)	34.12	35.48 (4.0)
Non-Major Ports	0.3	0.3 (0.0)	0.46 (53.3)	0.46 (0.0)	5.08 (1004.3)	11.07 (117.9)	14.38 (29.9)	6.53	7.84 (20.1)
All Ports	42.74	46.71 (9.3)	57.47 (23.0)	56.50 -(1.7)	59.33 (5.0)	67.62 (14.0)	82.38 (21.8)	40.65	43.32 (6.6)
Figures in bracket represents percentage change over the previous year/period. (P) Provisional. *: Dhamra Port has started operations in May 2011.									

2.4.9 WEST BENGAL

2.4.9.1 The State of West Bengal has a coastline of about 158 kms which has two Docks at Kolkata and Haldia under a single major port and one non- major port.

The trends in the cargo handled at both major and non-major ports of the State during the last few years and first six months of the current and previous year are given in **Table 23.**

Table 23 - West Bengal :Trends in Cargo Handled at Major & Non-Major Ports (Million Tonnes)									
Major/Non-Major	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14(P)	April-September	
								2013-14(P)	2014-15(P)
Major Ports	57.33	54.22 -(5.4)	46.43 -(14.4)	47.55 (2.4)	43.25 -(9.0)	39.93 -(7.7)	41.39 (3.6)	21.31	20.76 -(2.6)
Non-Major Ports	0	0	0	0	0	0	0	0	0
All Ports	57.33	54.22 -(5.4)	46.43 -(14.4)	47.55 (2.4)	43.25 -(9.0)	39.93 -(7.7)	41.39 (3.6)	21.31	20.76 -(2.6)
Figures in bracket represents percentage change over the previous year/period. P- Provisional									

2.4.10 OTHER NON-MAJOR PORTS

The other non-major ports are spread across the Union Territories (UTs) of Daman & Diu, Puducherry, Lakshadweep, and Andaman & Nicobar Islands. These ports in the UTs are administered through their respective Departments. Andaman & Nicobar Islands administration has constituted a ôPort Management Boardôfor the development of ports in the Islands. The two non-major ports of Daman & Diu are not handling any cargo traffic for the last few years.

The trends in the cargo handled at both major and non-major ports of the State during the last few years and first six months of the current and previous year are given in **Table 24**.

Table 24 - Union Territory: Trends in Cargo Handled at A & N Islands Port (Million Tonnes)									
Major/Non-Major	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14(P)	April-September	
								2013-14(P)	2014-15(P)
Andaman & Nicobar Islands	2.16	2.01 -(6.9)	2.07 (3.0)	1.68 -(18.8)	1.21 -(28.0)	1.07 -(11.6)	1.15 (7.5)	0.71	0.76 (7.1)
Figures in bracket represents percentage change over the previous year/period. P- Provisional									

The cargo handling capacity at Puducherry is estimated 200,000 tonnes of cargo per annum. In January 2006, the Government of Puducherry entered into a concession agreement with private developers for the development of deep water ports on BOT basis at Puducherry and Kariakal. The development work at Kariakal port has begun and commercial operations started in April 2009.

Table 26 - Union Territories: Trends in Cargo Handled at Non-Major Ports (Million Tonnes)									
Major/Non-Major	2007-08	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14(P)	April-September	
								2013-14(P)	2014-15(P)
Lakshadweep	0.03	0.03	0.03	0.03	0.03	0.03	0.03	0.06	0.06
Puducherry	0.01	0.05	1.32	4.71	6.42	6.91	6.28	3.25	2.74

3: PERFORMANCE INDICATORS

3.1 Capacity Utilization

Over the years, cargo handling capacity of major ports has steadily increased to cater to the growing volume of internal and external trade. The capacity of the ports which was 172.59 million tonnes at the end of 1993-94 increased to a level of 800.52 tonnes at the end of 2013-14. The port-wise capacity and traffic for 2013-14 is brought out in **Table 27.**

Table 27 - Major Port-wise Capacity Utilization During 2013-14 (Million Tonnes)

Name of the Port	Capacity	Traffic	Capacity Utilisation(%)
Kolkata Dock System	17.14	12.87	75.09
Haldia Dock Complex	49.75	28.51	57.31
Paradip	108.8	68.0	62.50
Visakhapatnam	88.92	58.50	65.79
Ennore	31.0	27.34	88.19
Chennai	86.04	51.11	59.40
Tuticorin	42.06	28.64	68.09
Cochin	49.66	20.89	42.07
New Mangalore	77.77	39.37	50.62
Mormugao	36.65	11.74	32.03
J. L. Nehru	65.88	62.33	94.61
Mumbai	44.53	59.18	132.90
Kandla	102.32	87.01	85.04
ALL PORTS	**800.52**	**555.5**	**69.39**

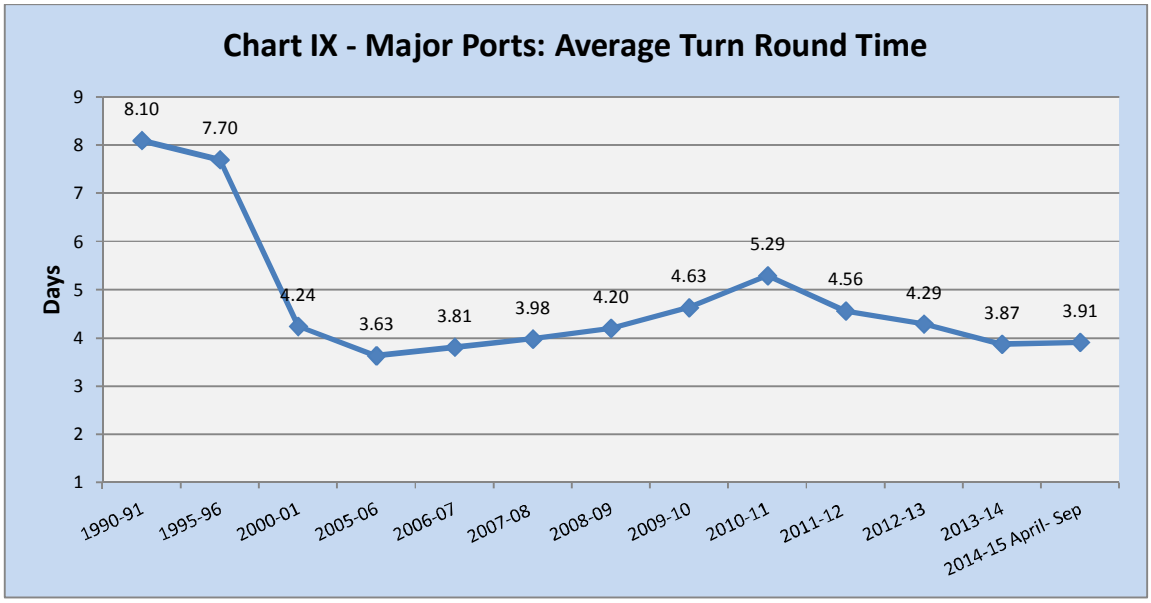
3.2 Port Efficiency

3.2.1 Efficiency at ports has an impact on transaction cost of shipping lines. Major Ports have improved their efficiency of operations as reflected in select physical performance indicators over the last several years. Some key operational indicators of physical performance pertaining to major ports for the select years are elaborated below.

Average Turn-Round Time (TRT)

3.2.2 This parameter has improved significantly during the past one and half decades for all the major ports. Average TRT for all major ports improved from 8.10 days in 1990-91 to 3.63 days in 2005-06. Thereafter the TRT has increased steadily to 5.29 days in 2010-11. In 2011-12, the average TRT declined to 4.56 days and further to 3.87 days in 2013-14. However, TRT increased marginally to 3.91 during the first half of 2014-15. The TRT varied in a range between 2.04 days at Cochin Port to 5.71 at Paradip during

April-September, 2014. Amongst the 12 major ports improvement in TRT during 2014-15(April-Sept.) in comparison to 2013-14 is reflected clearly for the Major Ports Kolkata DS, Haldia DC, Chennai, Tuticorin, New Mangalore, JNPT and Kandla. Port-wise TRT for select years are given in **Table 28**. The path of turn round time at major ports for select years since 1990-91 to 2014-15(April-Sept.) is presented in the **Chart IX** below.



Turn-Round Time - Total time spent by a ship since its entry till its departure.

Table 28: Average Turn Round Time (days)

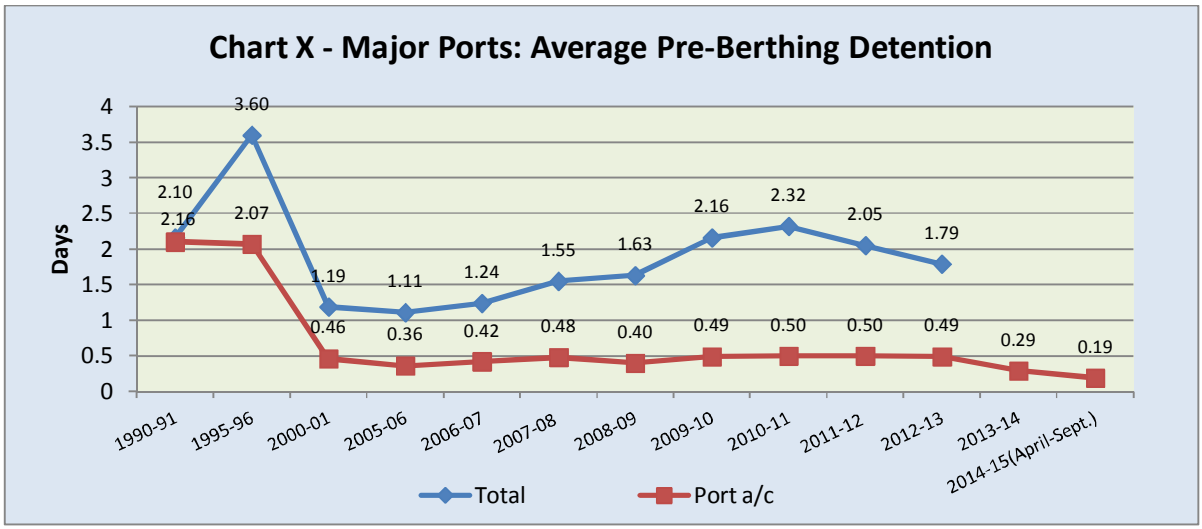
Port	1990-91	2000-01	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	April-September	
									2013-14(P)	2014-15(P)
1	2	3	4	5	6	7	8	9	10	11
Kolkata D.S	11.90	5.50	5.10	6.80	6.21	5.45	4.72	4.22	4.51	4.02
Haldia D.C	6.47	3.97	4.21	5.01	4.45	3.62	3.95	3.80	4.99	2.87
Paradip	8.40	4.16	4.78	9.04	7.73	6.33	4.39	4.62	5.08	5.71
Vishakhapatnam	7.07	3.71	3.93	4.78	5.84	5.68	5.39	4.73	4.79	5.36
Ennore	-	-	2.35	2.11	2.78	2.17	2.95	4.24	4.39	4.59
Chennai	7.20	5.83	4.15	4.04	4.36	3.91	3.24	2.46	2.55	2.54
Tuticorin	4.70	4.10	3.64	3.90	4.00	4.94	4.31	3.92	3.76	3.72
Cochin	4.00	3.11	2.14	2.08	2.20	1.82	1.58	1.80	1.73	2.04
New Mangalore	4.96	2.89	3.00	3.06	2.70	2.95	3.29	3.18	3.23	2.54
Mormugoa *	6.40	4.25	5.95	8.91	10.43	7.68	5.06	4.34	4.47	4.57
J.L.Nehru	-	2.21	1.90	2.01	2.64	1.94	2.48	2.44	2.68	2.32
Mumbai	10.80	5.20	4.95	4.61	4.96	5.22	5.58	4.76	4.95	5.13
Kandla	10.00	4.72	7.26	5.03	5.90	6.42	6.33	5.66	5.69	5.57
All Ports	8.10	4.24	4.20	4.63	5.29	4.56	4.29	3.87	4.12	3.91

(P) Provisional
* Relate to dry bulk cargo for MOHP(Mech.) and Berth No. 10 &11(Conv.)

Source: Major Ports/ Indian Ports Association (IPA)

Average Pre Berthing Detention Time (PBDT)

3.2.3 The average overall pre berthing detention time for all major ports declined from 2.2 days in 1990-91 to 1.63 days in 2008-09. However, in 2009-10 and 2010-11, the average PBDT edged up to 2.16 days and 2.32 days respectively. In contrast, average PBDT on port account has seen a sharper decline from 2.10 days in 1990-91 to 0.50 day in 2010-11. Average PBDT on port account which remained same at 0.50 days in 2011-12 and 2012-13 declined to 0.29 days in 2013-14 and further declined to 0.19 days in 2014-15 (April-Sept.). Port-wise PBD for select years is indicated in **Table 29.** The trajectory of weighted average of pre berthing detention time at Major ports- total and on port account -during 1990-91, 1995-96, 2000-01, 2002-03 onwards is shown in **Chart X** below.



Pre-Berthing Detention - The time for which a ship waits before getting entry into berth.

Table 29 : Average Pre-Berthing Detention(Days)

Port	1990-91	2000-01	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14*	April-September	
									2013-14*	2014-15*
1	2	3	4	5	6	7	8	9	10	11
Kolkata D.S	0.9	0.61	0.66	1.31	1.23	0.77	0.61	Neg.	0.00	0.00
Haldia D.C	1.66	0.91	3.38	4.39	3.73	2.54	2.29	0.78	1.60	0.20
Paradip	1.59	1.41	2.32	6.30	5.04	3.69	1.65	0.05	0.05	0.04
Vishakhapatnam	1.83	0.75	1.28	1.90	2.81	2.84	2.50	0.06	0.04	0.08
Ennore			0.27	0.37	0.65	0.76	1.33	Neg.	0.00	0.00
Chennai	2.1	2.45	1.39	1.35	1.61	1.16	0.80	0.04	0.04	0.03
Tuticorin	0.9	1.4	1.09	1.36	1.29	1.91	1.31	0.21	0.27	0.16
Cochin	0.83	0.74	0.7	0.85	1.03	1.05	1.09	0.04	0.04	0.09
New Mangalore	0.79	0.77	0.65	0.81	0.59	0.79	1.04	0.01	0.02	0.01
Mormugao**	2.51	1.32	1.77	3.46	4.07	2.94	1.62	0.35	0.44	0.38
J.L.Nehru		0.67	0.95	0.98	1.51	1.13	1.31	0.47	0.58	0.46
Mumbai	3.4	1.26	1.41	1.06	1.23	1.37	1.62	0.52	0.54	0.25
Kandla	4.4	1.51	2.62	2.60	3.32	3.74	3.58	0.59	1.03	0.44
All Ports	2.16	1.19	1.63	2.16	2.32	2.05	1.79	0.29	0.46	0.19

(P): Provisional. * Relates to Port Account only; Source: Major Ports/ Indian Ports Association(IPA)
** Relate to dry bulk cargo for MOHP(Mech.) and Berth No. 10 &11 (Conv.)

Average Output Per Ship Berth-day

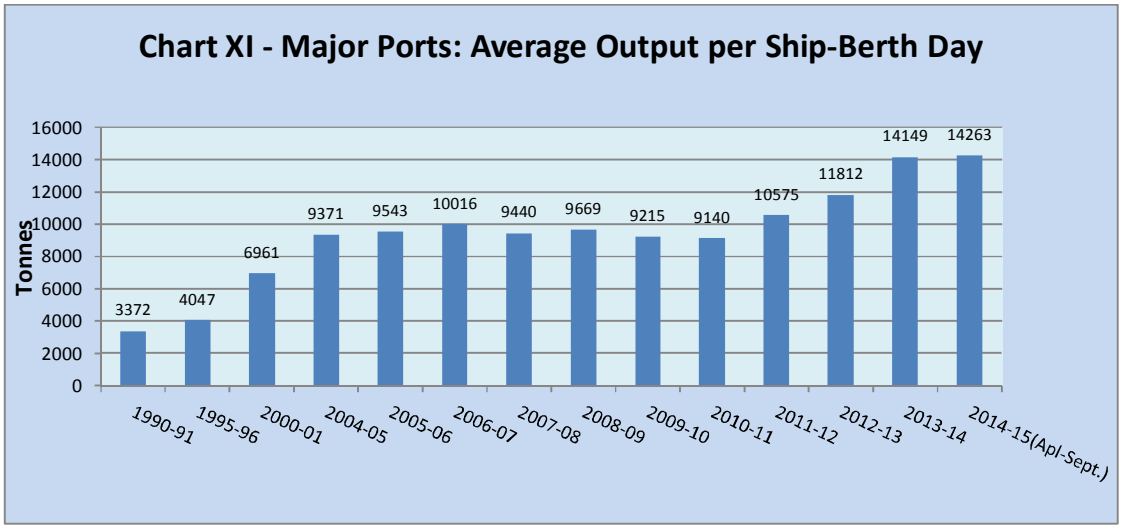
3.2.4 During the last 20 years this indicator has seen a tremendous improvement. Average Output per Ship-berth day has increased more than four times from 3,372 tonnes in 1990-91 to 14149 tonnes in 2013-14 for major ports. However, average output per ship berth day is marked by substantial variation across major ports ranging from a high 25522 tonnes in case of JLN port to a low of 3315 tonnes at Kolkata Dock System during 2013-14. This variation reflects the type of cargo being handled, level of mechanization and labour practices. Amongst the 12 major ports, improvement in average Output per Ship Berth-day during 2013-14 as compared to 2012-13 is visible in almost all the ports except Ennore, Murmugao and Kandla Ports. During 2014-15(April-September) major ports improved in average Output per Ship Berth day over the corresponding period of the previous year except Pardip, Vishakhapatnam, Chennai, Cochin, JLN and Mumbai Ports. Port-wise average output per Ship-berth day for select years and latest period are given in **Table 30.**

Table 30 : Average Output per Ship-Berth-Day (Tonnes)

Port	1990-91	2000-01	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	April-September	
									2013-14(P)	2014-15(P)
1	2	3	4	5	6	7	8	9	10	11
Kolkata D.S	560	2305	3027	1917	2253	2503	2762	3315	3119	4117
Haldia D.C	5659	6384	7732	6243	6563	6728	6078	6130	5640	7037
Paradip	4082	8503	12635	13853	14243	15995	16625	18179	17148	16967
Visakhapatnam	5325	9799	11171	10484	10334	10704	10641	10928	10940	10430
Ennore	-	-	28424	21665	17699	27505	27741	22336	22719	29703
Chennai	3912	6977	10778	11428	10984	10352	12046	14957	15110	14535
Tuticorin	2130	3983	5817	6934	7035	6733	7452	9633	9752	9862
Cochin	3714	6138	10599	11089	11752	15784	15878	15881	16298	15982
New Mangalore	4412	12192	13645	13896	14211	13957	15921	16304	16192	18621
Mormugao*	10429	12438	6290	5002	4409	10530	11484	10525	10137	10276
J.L.Nehru	-	6383	20344	21563	20393	19227	23319	25522	26025	24323
Mumbai	2310	4213	5717	6122	6042	6476	8709	9639	9824	7325
Kandla	4417	8230	13107	13549	14137	14272	15728	15131	15266	15762
All Ports	3372	6961	9669	9215	9140	10575	11812	14149	14133	14263

(P): Provisional. *Relate to dry bulk cargo for MOHP(Mech.) and Berth No. 10 &11 (Conv.)

3.2.5 The average out-put per ship-berth-day for selected years since 1990-91 to 2014-15(April-Sept.) is presented in the **Chart XI** below.



Output per Ship- Berth day ï Total tonnage handled distributed over total number of berth days

4. PRIVATE SECTOR/CAPTIVE/JOINT SECTOR PORT PROJECTS

Brief details of the ongoing Private Sector/Captive/Joint Sector Port Projects and a list of these projects under consideration as on 30.9.2014 are brought out in Appendix-I & Appendix-II in respect of Major Ports and in Appendix-III & Appendix-IV for Non ï Major Ports.

Appendix – I

Ongoing Private Sector/Captive/Joint venture Port Projects
(Major Ports)

Sl. No	Project Name	Port Name	Capacity (Million Tonnes)	Project Cost (Rs. Crores)	Project Status
1	2	3	4	5	6
1	Installation of 2 Nos. shore based unloaders in Coal Berth-2 (Captive user berth of Tamil Nadu Electricity Board)	Ennore	4	70	2 Nos. of unloader erection work is in progress. First unloader errection work has been completed and second unloader installation is in progress.
2.	Construction of two New Off-shore Container berths & Development of Container Terminal berth on BOT basis in Mumbai Harbour.	Mumbai Port	9.60MTPA (1.00 Mn TEUs)	1460.52	BOT Component- Entire Approach jetty is ready. Berth structure completed. Total investment till date is Rs. 608.96 crores. Ministry on 12.08.2013 had denied security clearance for procuring equipments from Chinese suppliers. M/s. ICPTL have forwarded names of four firms from whom they intend to procure the equipments. The same has been forwarded to the Ministry on 16.09.2013. The clearance from Ministry of Home Affairs is awaited. Development of container yard in Princess Dock Commenced. MbPT component- The dredging contract was terminated on 24.7.2013 and fresh tenders were invited for the balance work. Award of work is in progress. Present progress; Soil dredging; 7.20 Million Qubic Metres, Rock Dredging; 5.77000 Cub Metres, Filling 1.4 Million Cubic Metres, The RCD work is in progress.
3.	Development & Operation of International Container Transshipment Terminal (ICTT) at Vallar-padam	Cochin Port	12.5 to 40 MMT in phases	2118	Phase I of the ICTT Project with an investment of Rs. 1,262 crores partly commissioned on 11th February, 2011.
4.	Setting up of LNG Port & Re-Gasification Terminal at Puthuvypeen by Cochin. / Cochin Port Trust	Cochin Port	5 MMPTA	4150	The project is being implemented by M/s Petronet LNG Ltd. (PLL). 33.40 Hectares of land at Puthuvypeen handed over to M/s PLL on lease for setting up Re-gasification facilities. The concession Agreement between Cochin Port Trust and M/s PLL has been executed on 12.3.2009. The project facilities have been commissioned and first LNG ship berthed on 20/08/2013. The Gas pipeline network is being implemented by GAIL. LNG Terminal dedicated to the Nation on 04/01/2014.
5.	Multi-User Liquid Terminal (MULT) at Puthuvypeen SEZ (International Bunkering Terminal at Cochin)	Cochin Port	4.10 MMTPA	206.30	The project was assigned to IOCL subject to certain conditions. The concession Agreement signed with IOCL on 04/04/2014. M/s IOCL have entrusted with CoPT, execution of construction of jetty and its associated facilities through EPC contractor. M/s L&T Ramboll Consultin Engineers Ltd. Chennai was entrusted with

					preparation of FEED Document and Bid document for the Development of MULT. Tenders were invited on 31.05.2014 with due date of submission 17.7.2014, which was extended upto 10.09.2014. One bid received and is under evaluation.
6.	Setting up of Mechanized Iron Ore handling facilities at berth No. 14 by M/s. SICAL Logistics Limited on BOT basis.	New Mangalore Port Trust	6.62 MTPA (Capacity of Jetty)	296.03	The concession was awarded to M/s SICAL on 03.06.2010. The Concessionaire has not commenced the work due to ban on export & movement of iron ore imposed b Karnataka Govt. The Concessionaire has requested to excuse for performance under Force Majeure clause. M/s. SICAL was given one more opportunity to commence the work before 8.4.2014 and give milestone accordingly, failing which necessary action may be taken to terminate the contract as per the provisions of Concession Agreement. As resolved by the Port Trust Board a letter to M/s. SICAL is issued on 08.10.2013. & reminder letter sent on 09.01.2013 reply is awaited. Programme is not yet submitted by M/s. SICAL. M/s. SICAL has filed writ petition against the board of Trustees NMP under article 226 & 227 of constitution of India. Hon'ble High Court has given interim order date 20 February 2014 in the said W.P. disposal of writ petition. 1. Stay any further action that may be taken in relation to termination of the concession agreement between the Board of Trustees of the NMPT & M/s. SICAL. 2. Stay of the enforcement of any of the terms of the invoking / encashing the Bank Guarantee issued on behalf of M/s. SICAL in terms of the Concession Agreement and from receiving any monies under band guarantee. Port in process of vacating the stay.
7.	Development of Barge handling facility at Bharathi Dock	Chennai	1.35 MTPA	27.29	Concession agreement signed with Chennai Bunkering Terminal Pvt. Ltd., on 30.3.2013. Due to non-receipt of environment clearance and has requested by the concessionare the date for fulfilling conditions precedent extended upto 31.07.2014. L&T Ramboll consulting Engineers Ltd., is appointed as an Independent Engineer. WAPCOS Ltd., is appointed as consultant for preparation of EIA and assisting Chennai Port for obtaining Environmental clearance. MoEF accorded CRZ & Environment clearance on 27.08.2014. The Port has consider the request of concessionaire and extended the time for fulfilling the conditions precedent upto 30.11.2014.
8.	Development of WQ 6 berth in Inner Harbour for handling Multipurpose cargo at IH.	Visakhapatnam	2.08	114.5	Physical progress 81.15% Likely date of completion December, 2014. Concession Agreement signed on 31.07.2010 with M/s West Quay Multi Port Pvt. Ltd,
9.	Development of EQ-10 berth in Inner Harbour for handling Liquid Cargoes at IH.	Visakhapatnam	1.84	55.38	Physical progress 97%. Likely date of completion December, 2014. Concession Agreement signed on 16.08.2010 with M/s AVR Infrastructure Pvt. Ltd.
10.	Development of EQ-1 berth for handling steam coal by replacing the existing EQ-1 berth and part of EQ-2 berth at IH	Visakhapatnam	6.41	323.18	Physical Progress is 99.95%. Work completed.

11.	Development of EQ-1A berth on south side of EQ-1 berth in Inner Harbour for handling Thermal coal and Steam coal at IH.	Visakhapatnam	7.36	313.39	Physical progress is 55.60 % Expected completion by March, 2015. Concession Agreement signed on 03.02.2014 with M/s. SEQ Vizag Coal Terminal Pvt. Ltd.,
12.	Installation of mechanized Fertilizer handling facilities at EQ-7 at IH.	Visakhapatnam	5.21	217.58	Concession agreement signed on 18.05.2012. Letter of award given on 18.04.2013. Concessionaire has to submit 5 yrs. License fee as refundable security deposit. Termination notice issued on 05.04.2014.
13.	Up-gradation of the existing facility (OHC) and creating new facility (WQ-1) for iron ore handling.	Visakhapatnam	23	845.41	LOA issued on 31.05.2013 to M/s Vadinar Oil Terminal Ltd. Concessionaire agreement signed on 13.12.2013 and compliance of conditions precedent on either side is under progress.
14.	Extension of existing Container terminal in outer harbor.	Visakhapatnam	0.54 MTEUs	633.11	LOA issued to M/s VCTPL on 31.12.2013. Concession agreement is to be signed. Selection of independent Engineer is in progress.
15.	Development of Deep Draft Coal Berth on BOT basis	Paradip Port	10.00	479.01	Concession agreement has been signed with M/s Essar Paradip Terminal Ltd. on 10.11.2009 with 31% revenue share to PPT. Environment clearance and CRZ clearance were obtained on 04.01.2011. Now, Apex Court has pronounced their verdict on 17.12.2013 upholding PPTõs decision to terminate the licensees and dismissed the appeal of the parties. Port has now initiated action to vacate the plots so that the project site can handed over to selected concessionaire. In the meantime, the concessionaire has been requested to submit the required documentation including financial closure documents and begin mobilization activities at the site.
16.	Conversion of berth No. 8 as container terminal on.	Tuticorin	7.2 MTPA	312.23	LOA issued to M/s Dhakshin Bharath Gate way Terminals Pvt. Ltd. 7.8.12 with a gross revenue share of 55.19%. Concession Agreement signed on 4.9.12. Work is in progress. Two number of reach stackers arrived and firm has taken action to purchase shore crane. M/s STUP Consultant, Chennai is appointed as Independent Engineer for the project. Partial operation has started on 11.5.2014.
17.	Construction of North Cargo Berth ï I (Captive use)	Tuticorin	6.30 MTPA	494 for berth construction and 60000 for power plant.	Berth construction completed on 24.07.2012. Conveyor work and installation of shore unloader facilities completed.
18.	Construction of One Number of Shallow Draught Berth on DBFOT Basis.	Tuticorin	2.67 MTPA	84.08	LOA issued to M/s Transstroy ï OJSC consortium on 31.12.12 with a Gross revenue share of 22%. Concession Agreement signed on 17.4.13. Revalidation of Environmental Clearance received from MOEF vide letter dated 31.03.2014. Consent to establish obtained by the concessionaire from TNPCB vide letter dated 21.02.2014. Further action in being taken to handover the project to the PPP operator.
19.	Development of North Cargo Berth ï II on DBFOT basis.	Tuticorin	7.0 MTPA	332.16	The Concession agreement signed with concessionaire M/s Tuticorin Coal Terminal Pvt. Ltd. Mumbai on 11.9.2010. About 84% of work completed at

					site physically. Tender process completed to carry out dredging work in front of the Berth by the Port and awaiting environment clearance from MOEF. Security clearance issued at Port level on 30.06.14 for import of equipment from China.
20.	Development of North Cargo berth ï III	Tuticorin	9.15	420	V.O.CPT accorded approval to issue LOA in favour of the H1 Bidder M/s. Transstroy OJSC Consortium at a Gross Revenue Share of 30%. The concession Agreement signed on 07.02.2014. Capacity Addition of 9.15 MTPA. For the appointment of Independent Engineer tender was opened on 03.07.2014 and tender evaluation is in progress.
21.	Development of North Cargo berth ï IV	Tuticorin	9.15	355.0	LOA was issued to M/s Transstroy OJSC Consortium on 30.01.2013 at Gross Revenue share of 30% concession Agreement signed on 17.04.2013. For the appointment of Independent Engineer for the project. Order awarded to M/s. Consulting Engineering Services India Pvt Ltd on 25.06.2014.
22.	Upgradation of Mechanical Handling infrastructure at V.O. Chidambaranar Port Trust (Berth I to VI &IX)	Tuticorin	8.72 MTPA	49.2	LOA issued to M/s IMC ï PSTS Consortium on 25.3.13 with a gross revenue share of 26.55%. Concession Agreement signed on 24.5.13. Condition precedent was fulfilled on 31.08.2013. Cranes received from Germany on 27.02.2014 and commercial operation commenced from 24.03.2014.
23.	Development of Coal handling terminal at Berth No.7 of Mormugaon Port on Design, Build, Finance, Operate and Transfer (DBFOT) basis	Mormugao Port Trust	4.61	406.0	Completed in June, 2014.
24.	Enhancement of Cargo Handling capacity by installing rapid in motion wagon loading facility by SWPL	Mormugao Port Trust	2.50 MTPA	45.00	1. Concessionaire M/s. SWPL of Berth No. 5A & 6A has been granted permission by Board vide resolution No. 124 on 15.03.2013 for construction of Silo and Conveyer System on way leave basis. 2. Work commenced from 01.04.2013 and work completed on 30.06.2014 and trial loading from site started on 26.07.2014.
25.	Leasing of Berth No. 4 and 3 acres of land for 20 years on Annual Lease Basis for setting up Facility for Handling Bulk / Break Cargo	Mormugao Port Trust	0.20 MTPA	35.00	1. Letter of award issued to M/s JSW Jaigarh Port Ltd. Mumbai on 29.10.2013. 2. Proposal for Ministryôs approval sent vide letter No. CE/P&C-47/5316 dated 30.02.2014. Reply awaited.
BOT: Build Operate and Transfer; BOO: Build Own Operate; DBFOT: Design, Build, Finance, Operate and Transfer.					

Appendix – II

Private Sector/Captive/Joint Venture Port Projects Under Formulation
(Major Ports)

Sl. No	Project	Port Name	Capacity (Million Tonnes)	Project Cost (Rs. In crores)	Project Status
1	2	3	4	5	6
1.	Development of Multi-Purpose berths to handle clean cargo including container on BOT basis at Paradip Port.	Paradip Port	5.0 MTPA	430.78	By the bid closing date i.e. 26.03.2014, only one bid offer (RFP) was received from ULA which was not opened, being single bid and also because the security clearance letter from MoS may require clarifications. Details of the case have been put up to the Board on the further course of action including appointment of an Independent Agency like IPA to determine a reasonable figure of the revenue share so as to take final decision. The IPA have submitted their report. The Board resolved to take second opinion from RITES prior to award of work.
2.	Mechanization of EQ 1 to EQ 3 berths at Paradip Port on BOT basis.	Paradip Port	30	1633.44	By the bid closing date i.e. 27.03.2014, 04 nos. of RFQ application from (1) Essar, (2) Adani Ports, (3) Gangavaram Port and (4) Sterlite have been received. The RFQ evaluation report has been received from Transaction Adviser on 26.09.2014. Security clearance documents in respect of above bidders have been sent to Ministry on 08.04.2014.
3.	Development of Deep Draught Iron Ore Berth on BOT basis at Paradip Pot.	Paradip Port	10	681.94	All the eight applicants in the RFQ stage were qualified for participating in the Request for Proposal (RFQ) stage and submitting their financial offers. The bid due date for receipt of Financial Proposal was 15.04.2014. In the meantime, one of the bidders, ESSAR submitted representation that the CQ-3 terminal (which has been allotted to them for mechanization and subsequent operations) should be allowed to continue operation during the exclusively period of the Iron Ore terminal. This matter was re-examined, legal opinion obtained and all the details submitted to ministry for decision. MOS vide their letter dated. 27.02.2014 gave communicated to carry out bidding after preparing bidding document afresh. Based on Ministry's advice, present tender is discharged and fresh bid are invited. 02 nos. of RFQ documents have been received on bid due date. RFQ evaluation report has been received from transaction Adviser on 18.09.14.
4.	Development of LNG Terminal	Ennore	5.00	4320	Approval for setting up of LNG Terminal by IOCL on its own or through a Joint Venture Company subject to Govt. approval. Allotment of land to the JV let by M/s IOCL for development of LNG Terminal. Signing of MoU with IOCL under process. Various meetings held for finalization of commercial terms of the Concession Agreement. IOCL appointed the consultant for preparing the Front End Engineering

					design (FEED) and the same is in progress. MoEF has accorded approval for environmental and CRZ clearance on 10.2.14 MOU has been signed on 1.3.14. The draft concession agreement forwarded to IOCL on 6.5.14 for clearance.
5.	Coal Berth-III	Ennore	9	269.10	Award of berth construction has been issued on 30.12.2013 to M/s ITD Cementation India Ltd., for the value of 198.94 crore for construction on coal berth.
6.	Development of Container Terminal on DBFOT basis	Ennore	16.8	1407	The concession agreement signed with M/s Adani Ennore Container Terminal Pvt. Ltd., on 15.03.2014 for development of 730 M length. Tendering for appointment of independent engineer in progress.
7.	Development of Multi Cargo Berth on DBFOT basis	Ennore	2	151	The concession agreement signed with M/s Chettinad International Buch Terminal Pvt. Ltd., on. 28.03.14 for development of 270 M Quay.
8.	Development of fourth Container Terminal	Jawaharlal Nehru Port Trust	4.8 MTEUs	7915	LOA has been awarded to M/s PSA Bharat Investments Pvt. Ltd., on 26.02.14. The concession agreement signed on 6.5.2014.
9.	Extension of container berth by 330 M and other facilities:- (Now known as Development of standalone container handling facility with a quay length of 330 m North on JN Port	Jawaharlal Nehru Port Trust	0.8 MTEUs	600	The work order issued to M/s DP World Pvt. Ltd., on 31.10.12 at 28.09% Revenue share. The concession agreement signed on 19.06.2013. M/s CES is appointed as an Independent engineer and M/s DP World has commenced the work. Wharf construction work is in progress.
10.	Dredging & Infrastructure development for handling bigger ships at 18 to 22 ID Harbour Wall Berths.	Mumbai*		613	The project is earmarked for implementation through PPP mode. M/s. RITES Ltd. appointed as Transaction Adviser and letter of award issued on 07.05.2013. The Board in its meeting held on 28.06.2013 accepted the review of DPR and the revised cost estimate of Rs. 613 crores. Validity of Environmental Clearance extends for 5 years. Tariff fixation proposal notified in the Gazette by TAMP.
11.	Development of off-shore multipurpose cargo berth	Mumbai*	4 MT	696	Project approved by CCEA. Tariff fixation proposal sent to TAMP and TAMP notified the tariff in Gazette on 26.12.2013. EIA/RA study awarded to M/s. Terracon Ecotech Pvt. for Rs. 11.49 lakhs on 27.1.2014.
12.	Development of Container Freight Station	Mumbai*		80	Work order placed to M/s KPMG on 3.9.13 for preparation of DFR. M/s KPMG has submitted preliminary report on 16.12.2013 and comments of concerned department handed over to KPMG to finalise the report.
13.	Development of facilities for handling & storage of bulk cement	Mumbai*	1.25 MT	95	Tender for leasing of land for setting up facilities for handling bulk cement and bagging plant floated on 8.5.13 and again on 3.7.2013 with revised upfront fee. As per directives of Ministry the matter is referred to TAMP for approval of rates considered for working out Reserve Price. Approval is awaited. Tender discharged on 28.03.2014.
14.	Development of Coal handling facilities at Mumbai Port Trust	Mumbai*	3 MT	50	Invitation of offers for appointment of consultant for preparation of DFR through PPP mode. Work order placed to M/s Tata Consulting Engineers Ltd. On 3.8.2013. Draft Inception report submitted. DFR presented by the consultant who has been advised to finalise the same with certain minor

					changes.
15.	Development of Bunkering Facilities Terminals at Mumbai Port Trust	Mumbai*			Tender for consulting services for preparation of DPR through PPP on tender-cum auction basis invited. Work order issued on 19.11.2013. Feasibility report received and forwarded to TC members for comments. Draft detailed project report received on 1.4.2014.
16.	Barge handling facilities at Khori Creek	Kandla*	4	100	Under planning stage
17.	Construction of T shape Jetty at at Tekra (Phase-II)	Kandla*	14	1500	The scheme will spill over in 13th five year plan. Under planning stage.
18.	Setting up of barge jetty at Tuna on captive use basis	Kandla*	1.5	22	EOI invited. Only M/s Shree Renuka Sugars has submitted application till due date. Committee recommended the proposal submitted by M/s Shree Ranuka Sugars and also recommended to put up to the Board for approval.
19.	Construction of barge jetty at Tuna on BOT basis	Kandla*	5.49	255.3	Feasibility Report, RFQ and TAMP proposal under approval.
20.	Strengthening of oil jetty 1 & 2 to handle 13/14 m. draught vessels	Kandla	1.57	14.29	LOA issued to M/s Indiana build infrastructure pvt. Ltd., Mumbai on 18.03.14. work order issued on 20.5.2014.
21.	Development of Port based multi product SEZ	Kandla*	-	1095	In-principle approval from MoS for formation of SPV is awaited. Concurrence of GoG is still awaited. KPT has appointed NIO, Mumbai for carrying out EIA studies.
22.	Development of General Cargo Terminal at Q8-Q9 berths (Modernization of Coal Handling at Cochin Port)	Cochin Port	4.23 MTPA of Coal	198	The project was to develop a 300 metre berth length of Q8-Q9 berths as a dedicated Coal only terminal, with 14.42 ha of backup area and involving investment of around Rs. 198 crores. RFQ's for the Project were invited on 16/06/2014 with Application Due Date on 12/08/2014 which was further extended upto 16/09/2014, as per the request of a prospective applicant. However, no application to drop this project on DBFOT basis.
23.	Construction of 1 No. shallow water berth for handling construction materials	Tuticorin	2.00 MTPA	65.37	Court case filed by M/s Indian Port Terminal, Tuticorin. The matter is at Hon'ble Madras High Court, Chennai. Hearing completed and awaiting for judgment. Port filed implead petition as per Ministry instruction on 20.03.2014.
24.	Development of Outer Harbour (17 Nos. of berth including constructions of Breakwater and Dredging)	Tuticorin	19.20 MTPA (16,00,000 TEUs	23431.92	During the review meeting dated on 03.08.2012, a decision was taken to go for preparation of fresh DPR since the existing one was prepared in 2007 and there was much variation in the traffic profile. Accordingly Global NIT was published. After evaluation, work order for the preparation of Detailed Project Report was issued to M/s. i-Maritime, Mumbai on 26.02.2013 with a contract period of 9 months from the date of award of work order. The firm has presented the draft DPR in the final DPR on 19.10.2013. As per the final DPR channel is (-) 18m. The total cost of the project is Rs.23431.92 Crores in four phases. The first phse is Rs. 11,636 Crores which consists of Dredging, breakwater and road of Rs. 7241.89 Crores including interest during

					construction and the balance to be borne by the PPP operators. Total traffic for phase ï I is 85.8 Million Tonnes per annum. On completion of four phases port will have a capacity addition of 290 MTPA. Investment by Port for Phase 2, 3, & 4 developments is nominal and main investment will be made by the PPP operators A fresh application seeking approval for Terms of Refrences submitted toMOEF on 5.03.2014. EAC prescribed to conduct public hearing. Accordingly offers called from accredited agencies for conducting EIA studies on 27.8.2014. Five offers received and tender opened on 15.09.2014. Work order issued. Mathematical Physical model study being carried out by CWPRS, Pune. Action is being taken to conduct bore hole investigation and hydrographic survey and seismic survey for finalization of Break water layout and dredging quantities. Port has engaged M/s I.P.A for revalidating the D.P.R submitted by M/S i-maritime.
25.	Development of Mega Container Terminal.(Development of a new Outer Harbour on BOT basis	Chennai	(48 MTPA)	5100	The mega container terminal project is being restructured and port has appointed M/s. Ernst & Young as consultant for preparing feasibility study and TA.
26.	Development of Rajiv Gandhi Dry Port and Multi Modal Loistic Hub at Mappedu near Sriperrumbudur; under PPP mode	Chennai Port Trust	18.45 MTPA	415	Lease Deed executed for 120.85 acres and 0.89 and 0.89 acres on 29.6.2012 and 20.3.2013 respectively for the total land area 121.74 acres accquired for SIPCOT handed over the land area and taken over by Chennai Port on 31.05.2013. On the bid due date, no bids were received. Project restructuring options placed in the Board Meeting held on 03.08.2013. Proposal invited on tender-cum-auction basis for a period of 30 years based on the latest ñLand Policy Guidelines 2014ò Two offers received for 14.96 acres only. Letter of Intent issued to the Sucessful bidder Ennore Cargo container Terminal on 04.07.14. subject to issue of LOA will be issued on receipt of written consent form SIPCOT for sub-lease SIPCOT has demanded License Fee for sub-lease. In reponsem ChPt requested SIPCOT not to insist for payment of license fee, for which a reply is awaited from SIPCOT Tender re-invited for balance portions form 25.09.2014.
27.	Development of Dry Dock /Ship Repair facility at Timber pond/Boat basin in Chennai Port on Private Sector Participation (Land Lease Model) for a lease period of 30years	Chennai Port Trust		315	In the project review meeting with Chairman on 30.5.2014, it was decided to re-invited the tender with same scope of work as CSL is not interested to take up the project Tenders were re-invited with the Terms & conditions as in original invitation. Sale of tender document is from 26.6.14. Second Pre-Bid meeting held on 10.10.2014. Bid submission extended up to 12.11.14. Apart from private bidders, Coast guard has also expressed interest in participating in the project.

28.	Development of Marine Highway along East Coast connecting Chennai and Kmarajar Ports	Chennai Port Trust		6	Tender for marine Highway Project were invited form 5.3.2014. To promote the project, Chennai Port conducted Road Shows at Goa & Mumbai on 5.4.2014 &16.4.2014 with Goa Barage Onwer Association and ICC Shipping Association respectively to elicit the views of the Barge Owners and concerned stakeholder. An Interractive session was held on 7.5.2014 with stakeholder, ChPT Terminal Operators ï CCPTL & CIPTL, Customs CFS Operator including CWC, Linear operators, CSAA, CHA and KPL to discuss on the various aspects of the project and whether to operate Ro-Ro or Lo-Lo. KPL agreed to waive Pilotage charges subject to their providing a restricted Pilot License to the Master of the Barge having the certificate of Competancy as Master (FG) after giving a brief training for a period of one month followed by the examination. There are some issues viz; Statutory requirements form customs & Mercantile Marine Departments needs relaxation. These issue are being resolved in consultant with respective Authority. A meeting was initially held with the Dy. Commissioner, Customs on 21.7.14 ti discuss the Customs related issues. Bid submission date was extended to 14.11.14
29.	Development of JD (EasT) berths as Multi-cargo Terminal	Chennai Port Trust	5	369	The proposed Terminal will handle Multi-cargoes viz sugar, food grains granite, limestone slag & finished steel products. Board approved the proposal at its meeting on 25.6.2014 and recommended further action including invitation of RFQ, RFP etc. Pre-Nit Conference held on 22.7.2014 with prospective Developers. RFQ document is on sale from 15.9.2014 with the bid due date extended to 14.11.2014. Reference Tariff proposal was forwarded to TAMP, SFC memo has been forwarded to MoS for project approval.
30.	Construction of a riverine jetty south of 2nd Oil Jetty through DBFOT Basis.	Haldia Dock Complex under KoPT *	1.5 MTPA	471	Feasibility Study being undertaken, following which RFQ document would be issued.
31.	Construction of a riverine jetty south of 2nd Oil Jetty through DBFOT Basis.	Haldia Dock Complex under KoPT *	1.5 MTPA	471	Feasibility Study being undertaken, following which RFQ document would be issued.
32.	Construction of a riverine jetty south of 2nd Oil Jetty through DBFOT Basis.	Haldia Dock Complex under KoPT *	1.5 MTPA	471	Feasibility Study being undertaken, following which RFQ document would be issued.
33.	Construction of a riverine jetty south of 2nd Oil Jetty through DBFOT Basis.	Haldia Dock Complex under KoPT *	1.5 MTPA	471	Feasibility Study being undertaken, following which RFQ document would be issued.
34.	Construction of a riverine jetty south of 2nd Oil Jetty through DBFOT Basis.	Haldia Dock Complex under KoPT *	1.5 MTPA	471	Feasibility Study being undertaken, following which RFQ document would be issued.
35.	Development fo Multipurpose Cargo Terminal at the Port of Mormugao, Goa	Murmugao	5.74 MMPTA	950	1. Board approved for implementing the project under PPP mode vide Resolution No. 234 dated 21.02.2014.

					2. Proposal sent to TAMP for fixation of Upfront Tarrif on 08.04.2014. TAMP hearing was held on 20.06.2014 3. Work order for ñproviding Finanacial Consultancy and Transcation Advisory Servicesò is issued to M/s. Credible Management and Consultants. Pvt. Ltd., New Delhi on 18.09.2014 4. NIT for RFQ was published on 19.06.2014. Pre bid meeting is held on 10.07.2014. And Bid opened on 26.08.2014. 5. Work order for conducting Environment Impact Assessment studies is issued to Ms WAPCOS LTD. Gurgaon on 29.09.2014.
36.	Deeping of Approach channel for cape size vessels at Mormugao Ports.	Mormugao	2 MMPTA	530	1. M/s WAPCOS has been appointed for carrrying out Feasibility studies. 2. M/s WAPCOS has been appointed for carryingout Environment Impact Assessment (EIA) study. 3. Work order is issued to M/s CWPRS for carry out Mathematical Model studies for Hydrodyanamics and sendimentation. 4. Work orderis is issued to SBI Capital Markets Ltd. Mumbai on 13.10.2014 for providing Financial Consultancy and Transaction Advisor.
BOT: Build Operate and Transfer; BOO: Build Own Operate; DBFOT: Design, Build, Finance, Operate and Transfer.					

Appendix – III

Ongoing Private Sector/Captive/Joint venture Port Projects (Non-Major Ports)

Sl. No	Project Name	State/ Ports Maritime Board	Capacity (Million Tonnes)	Project Cost (Rs. In Crores)	Project Status
1	2	3	4	5	6
1.	Development of Coal terminal for UMPP	Mundra, (Gujarat) *	31	349	Completion of construction of the following: 1) 4 berths 2) Reclamation 3) Back up area 4) Conveyor system on three berths.
2.	Development of South Basin at Mundra	Mundra (Gujarat) *	32	151.1	Completion of construction of the following: 1) 810 m container berths 2) T III Multipurpose berths 3) Reclamation 4) Backup area as per the requirement for the developed facility. Total capacity planned is 55 MT.
3.	Hazira Port Pvt. Ltd (HPPL)	Hazira, (Gujarat) *	2.50 (MMTPA)	1180.4	Phase 1 A (LNG Terminal) completed and operational.
4.	Development of BGCT under phase IB at Hazira.	Hazira, (Gujarat) *	24.6	267.6	Completion of construction of the following: 1) 2 container berths and 3 general cargo berths 2) breakwater 3) backup facility for handling the cargo.
5.	Development of Solid Cargo Port Terminal	Dahej, (Gujarat) *	15	84	Two solid cargo berths with cranes completed 1) Backup area constructed 2) Conveyor system for berths no. 1 completed as per DPR.
6.	M/s Essar Bulk Terminal Limited	Salaya Gujarat) *	5	20.8	Construction activity initiated
7.	M/s ABG Cement Ltd	Mora Surat Gujarat) *	3	10.4	Construction activity initiated
8.	M/s Ultra Tech Cement Ltd (Expansion)	Kovaya Pipavav Gujarat) *	5	17.1	Construction activity initiated
9.	Development of an all weather and Multipurpose port at Rewas-Aware, Dist. Raigad	Thal, Rewas-Aware Maharashtra *	43	5200	All clearances including Environmental clearance in place. Pre-construction activities in progress. Right of way through Mumbai Port Trust waters for navigation channel of Rewas- Aware port is still awaited. Matter taken up with Ministry of Shipping, Govt of India.
10.	Development of an all weather and Multipurpose port at Dighi,	Rajpuri (Dighi)	35	3500	One berth has become operational.

	Dist. Raigad	Maharashtra *			
11.	Development of an all weather and Multipurpose port at Dhamankhol- Jaigad Port Dist. Ratnagiri	Jaigad, (Dhamankhol Bay) Maharashtra *	36	2900	Two berths in first phase have been commissioned. Detailed Project Report for second phase of the project has been approved and the Proposal for environmental clearance is under consideration of the Ministry of Environment & Forests, Govt. of India.
12.	Development of an all weather and Multipurpose port at Lavgan- Jaigad Port Dist Ratnagiri (Cargo facility + Ship Repair system)	Jaigad, (Lavgan- Bay) Maharashtra *	18	700	Cargo berth facility has been commissioned and commercial operations are likely to start shortly. The Ship repair facility is likely to commission by end December 2013.
13.	Development of an all weather and Multipurpose port at Vijaydurg Port Dist. Sindhudurg	Vijaydurg, Maharashtra *	12	2275	Detailed Project Report is received. The Ministry of Environment & Forests, Govt. of India has yet to issue Terms of Reference (ToR) for environmental clearance due to moratorium imposed upon projects in Ratnagiri and Sindhudurg districts.
14.	Development of an all weather and Multipurpose port at Redi Port, Dist Sindhudurg	Redi, Maharashtra *	19	716	Detailed Project Report has been approved. All formalities for obtaining environmental clearance have been completed and the project is awaiting environmental clearance from ministry of Environment & Forest, which is pending due to moratorium imposed upon projects in Ratnagiri and Sindhudurg districts.
15.	Establishing a captive port at Parangipettai by M/s IL &FS Limited	Parangipettai Tamil Nadu	13 MMTPA	1349	Construction yet to be commenced.
16.	East Coast Energy Pvt. Ltd.	Meghwaram Andhra Pradesh	Captive Port	2370	To commence by last quarter of 2017.
17.	Anrak Aluminum Ltd.	Nakkapalli Andhra Pradesh	5	4790	No development so far
18.	-	Bhavanapadu, Andhra Pradesh	6.45	2362	DPR under process.
19.	-	Calingapatnam Andhra Pradesh	6.45	2362	Not be to be developed as indicated by GoAP
20.	KSEZ	KSEZ, Andhra Pradesh	37.93		To be finalized.
21.	Phase-2-Development of Krishnapatnam Port	Krishnapatnam Andhra Pradesh	44.30(Bulk & Gen Cargo) 3.30 MTEU (Container)	6600	Under construction

22.	Expansion, Development of Dhamra Port (PPP Mode)	Dhamra Port Orissa	25 MTPA to 109 MTPA	10016	(i) Phase-I is in operation from 6.5.2011 (ii) Phase-II Development is in progress.
23.	Expansion, Development of Gopalpur Port (PPP Mode)	Gopalpur Port Orissa	0.55 MTPA to 54 MTPA	1411	(i) MoEF clearance received on 30.3.2011 (ii)Developmental activity are in progress (iii)All Weather Direct Berthing Port declared open for commercial traffic w.e.f. 29.03.2013 (iv) The Port operation has suspended due to last cyclone PHAILIN
24.	Karaikal Port-Phase 2A Development	Karaikal Port Puducherry	21.5	1600	Work in progress
25.	Karaikal Port-Phase 2AE Development	Karaikal Port	6.5	500	Work in progress

Appendix – IV

Private Sector/Captive/Joint Venture Port Projects Under Formulation (Non-Major Ports)

Sl. No	Project	State/ Ports Maritime Board	Capacity (Million Tonnes)	Project Cost (Rs. In Crores)	Project Status
1	2	3	4	5	6
1.	GCPTL Proposed 2nd liquid jetty & allied infrastructure.	Dahej (Gujarat) *	2.5-3.5 (estimated)	2500 (estimated)	Techno- Commercial Feasibility study is under progress.
2.	Sterling Port Limited	Dahej (Gujarat) *	21 (Phase -I)	2501.8	Under Construction.
3.	Petronet LNG Ltd. 2nd jetty	Dahej (Gujarat) *	10	900	Under Construction
4.	Petronet LNG Ltd. 2 nd Tank & Regassification facility.	Dahej (Gujarat) *	15	3125	Construction starting from September 2013.
5.	Development of Greenfield port.	Chhara (Gujarat)	8	Option -1 1216.6 Option-11 1079.8	Env Clerance Underway. Concession agreement discussion going on
6.	Development of Greenfield port.	Modhawa (Gujarat) *	Developer Under selection at GoG Level		
7.	Development of Greenfield port.	Bedi (Gujarat) *	Developer Under selection at GoG Level		
8.	Development of Greenfield port by M/s. IL & FS	Khambhat (Gujarat) *	Keep on hold		
9.	Development of Greenfield port by Ms. JK Cement Group	Dholera (Gujarat)	Keep on hold		
10.	M/s Reliance Ports and Terminal Ltd- multipurpose jetty	Sikka Gujarat) *	15	204.8	Construction approval has been granted
11.	M/s Essar Bulk Terminal limited (3rd Expansion)	Hazira (Gujarat) *	20	154.6	Inprinciple approval has been granted
12.	M/s Reliance Industries Limited Second SPM	Hazira (Gujarat) *	4	35	GMB granted final permission of Construction
13.	M/s Sanghi Industries Ltd Captive jetty (Expansion)	Jakhau Gujarat) *	8	45.5	Environmental clearance has been completed

Sl. No	Project	State/ Ports Maritime Board	Capacity (Million Tonnes)	Project Cost (Rs. In Crores)	Project Status
1	2	3	4	5	6
14.	M/s ABG Cement Ltd	Jakhau Gujarat) *	4	6.1	Inprinciple approval has been granted
15.	M/s Universal Success Enterprise Ltd	Gojiness (Bhogat) Gujarat) *	5	126	Environmental clearance has been completed
16.	Captive port facility by M/s. Udangudi Power Corporation Ltd.	Udangudi Thoothukudi Tamil Nadu	6	9083	Port has been notified. Development under process.
17.	Captive port facility by M/s. Coastal Tamil Nadu Power Ltd.	Cheyyur Kancheepuram Tamil Nadu	13	16000	The Port limits are yet to be assessed.
18.	Captive port by M/s. Chettinad Power Corporation Ltd.	Tharangambadi Taluk Nagapattinam Tamil Nadu	3.5	7500	Port has been notified. Development under process.
19.	Captive port permitted to handled other commercial cargo by M/s. Nagarjuna Oil Corporation Ltd.	Thiruchopuram in Cuddalore Tamil Nadu	9.3	384 (Captive facility only)	Port has been notified. Development under process.
20.	2nd stage Development of Karwar Port	Karwar Karnataka	5	150	Issue of bid documents is under progress.
21.	Development of Modern Sea Port at Tadri.	Tadri Karnataka	34.40	300	IDD Nominated KSIIDC as nodal agency. Preparation of DPR is under progress.
22.	Development of Deep Draft Green field Port at Haldipur Port	Haldipur Karnataka (Proposed)	18	190	DPR under progress by Mineral Enterprises Limited, Bangalore.
23.	Development of Honnavar Port	Honnavar Karnataka	2	20	M/s. Honnavar Port Ltd., has submitted DPR for the approval of the Government.
24.	Captive Port at Manki Port	Manki Karnataka	1	4.6	M/s. Renuka Sugar is in the process of preparing DPR for construction of captive jetty.
28.	Development of Port at Subarnarekha Mouth(Kirtannia) (PPP Mode)	Subarnarekha Mouth (Kirtannia) Orissa	25 MTPA to 55 MTPA	2345	Land acquisition/alienation process is in progress.
29.	Development of Port at	Astaranga	17.70 MTPA	7342	Land acquisition/alienation process is in

Sl. No	Project	State/ Ports Maritime Board	Capacity (Million Tonnes)	Project Cost (Rs. In Crores)	Project Status
1	2	3	4	5	6
	Astaranga (PPP Mode)	Orissa	to 71.30 MTPA		progress.
30.	Captive port (PPP) Mode	Chudamani Orissa	3 MTPA to 10 MTPA	N.A	MoU signed on 22.10.2009 between Government of Odisha and Aditya Birla Group (Essel Mining & Industries Limited)
31.	Development of Bulk Liquid Berth for handling LNG	Karaikal Port Puducherry	5	1948	Applied for Environment clearance

Source: Maritime States/Maritime Boards.

*: Information relates to March, 2014

Annex-I

Outlay And Expenditure - Port Sector (Central)

(Rs. In crore)

Port	Annual Plan (2007-2008)		Annual Plan (2008-2009)		Annual Plan (2009-2010)		Annual Plan (2010-11)		Annual Plan (2011-12)		Annual Plan (2012-13)		Annual Plan (2013-14)		Annual Plan (2014-15)	
	App. Outlay	Actual Exp.	App. Outlay	Actual Exp.	App. Outlay	Actual Exp.	App. Outlay	Actual Exp.	App. Outlay	Actual Exp.	App. Outlay	Actual Exp.	App. Outlay	Actual Exp.	App. Outlay	Actual Exp.(Upto Sept.)
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	14	15
Kolkata (a)	37.37	63.05	44.97	53.64	58.00	48.85	50.88	49.76	63.73	21.29	28.45	17.34	38.03	5.86	43.75	1.21
Mumbai	50.36	26.10	150.00	23.50	192.00	146.09	179.58	116.76	176.57	142.05	279.79	149.30	427.60	24.87	50.00	32.83
JNPT	188.18	70.28	175.17	48.77	324.00	177.94	89.61	38.24	153.69	140.52	341.18	240.21	1559.10	137.58	647.54	36.67
Chennai	47.81	44.41	72.95	48.98	34.00	58.37	243.00	184.46	136.00	4.44	145.00	81.75	107.00	9.20	41.99	3.17
Cochin	158.52	139.07	255.65	246.33	191.97	190.93	259.35	160.86	115.08	92.21	93.45	78.47	123.05	3.40	42.84	6.47
Visakhapatnam	83.00	36.61	39.97	31.44	65.01	75.74	151.00	121.19	190.00	113.45	102.71	57.92	182.34	26.07	306.88	143.14
Kandla	89.49	38.25	140.87	58.07	115.00	62.64	45.66	52.70	92.27	52.82	166.89	138.44	145.45	28.30	100.00	202.48
Mormugao	10.10	11.18	22.07	17.52	71.00	31.01	66.29	71.52	108.93	69.17	71.36	46.95	110.00	24.75	82.87	14.71
Paradip	100.00	42.05	288.00	101.47	276.51	128.19	166.21	81.26	70.00	74.80	127.31	73.73	96.91	55.65	132.60	32.18
New Mangalore	36.00	25.81	30.00	30.11	34.00	32.48	31.00	24.56	36.00	38.45	36.00	45.50	75.00	8.04	50.00	56.96
Tuticorin	79.46	63.16	96.87	65.12	220.50	39.03	90.94	172.08	291.97	369.65	201.42	42.63	547.82	3.19	600.85	3.31
Ennore Port Ltd.	61.00	34.53	70.00	102.43	95.01	50.52	95.00	70.12	60.00	61.92	73.50	80.03	600.00	28.38	220.00	29.44
Sethusamudram Ship Canal Project	664.22	119.47	1581.07	152.24	161.10	20.98	10.00	6.02	10.01	8.51	4.00	2.12*	6.00	1.42*	0.50	1.82*
WEB Based EDI Port Community System	7.50	0.04	6.00	1.00	3.00	3.33	4.88	4.46	2.38	2.01	2.00	2.00	1.00	##	0.50	0.00
Others (b)	477.26	170.67	598.38	88.50	564.90	161.68	362.86	223.31	673.09	518.08	901.87	579.43	635.00	318.98	464.80	12.37
Survey Vessels	19.00	0.00	79.00	5.00	10.00	0.00	15.00	15.00	15.00	15.00	0.00	0.00##	0.00	0.00##	0.00	0.00
Total	2109.27	884.68	3650.97	1143.10	2416.00	1227.8	1861.26	1392.30	2194.72	1724.37	2574.93	1633.70	4654.30	675.69	2785.12	574.95

(a) Includes Haldia and RR Schemes.

(b) Includes DCI, ALHW, R&D Studies, Post Tusnami Works, Minor Ports Studies,IT for D/Shipping, Web based PCS Dev of Non-Major Ports etc.

* The amount is received as equity from Govt. of India and other stakeholders.

App.Outlay: Approved Outlay

##- Not Available

Source : Annual Plan - Port Sector (Deptt. of Shipping)/IPA

Annexure-II

Commodity-wise Traffic Handled at Major Ports

(000 Tonnes)

Port	Period	POL & its Products	Iron Ore	Thermal Coal	Coking Coal	Ferti.& FRM (Dry)	Food grain	Container		Others	Total
								Tonnes	TEUs		
1	2	3	4	5	6	7	8	9	10	11	12
Kolkata	2012-13	708	158	0	9	94	107	6960	463	3808	11844
	2013-14	717	147	0	263	4	398	7062	449	4283	12874
April-Sept.	2013-14(P)	337	86	0	112	4	210	3726	238	1949	6424
	2014-15(P)	289	50	0	16	17	208	3985	257	2133	6698
Haldia	2012-13	4796	1715	1976	4503	386	0	2869	137	11839	28084
	2013-14	6105	2170	1598	5350	559	0	2202	114	10527	28511
April-Sept.	2013-14(P)	2973	1129	842	2733	317	0	1129	60	5762	14885
	2014-15(P)	2942	722	575	2586	399	0	940	57	5898	14062
Paradip	2012-13	16467	1833	21403	4702	4146	0	171	13	7830	56552
	2013-14	17703	5593	25027	7042	4054	0	99	9	8485	68003
April-Sept.	2013-14(P)	9420	2719	12804	3210	1731	0	28	3	4207	34119
	2014-15(P)	8944	1015	13644	4302	2239	0	26	2	5309	35479
Visakhapatnam	2012-13	13501	12569	2951	6795	2588	1121	4554	247	14959	59038
	2013-14	14008	13032	2744	6928	2566	834	4916	262	13475	58503
April-Sept.	2013-14(P)	6958	6273	1364	3533	1450	549	2533	131	6276	28936
	2014-15(P)	7603	5468	1252	2640	1352	222	2380	134	9672	30589
Chennai	2012-13	13376	52	0	0	421	314	29708	1539	9533	53404
	2013-14	12784	71	0	0	415	286	28330	1468	9219	51105
April-Sept.	2013-14(P)	6978	27	0	0	169	172	14602	757	4301	26249
	2014-15(P)	6328	94	0	0	224	28	15283	792	4760	26717
Ennore	2012-13	521	0	14240	685	0	0	0	0	2439	17885
	2013-14	2340	0	22127	355					2515	27337
April-Sept.	2013-14(P)	949	0	10403	196	0	0	0	0	1128	12676
	2014-15(P)	1497	0	11738	141	0	0	0	0	1273	14649
Tuticorin	2012-13	547	0	6689	0	1059	128	9372	476	10465	28260
	2013-14	479	0	6644	0	1178	49	10129	508	10163	28642
April-Sept.	2013-14(P)	232	0	3538	0	591	25	5044	252	4663	14093
	2014-15(P)	337	0	3889	0	749	51	5444	278	5246	15716
Cochin	2012-13	14027	0	28	0	353	0	4607	335	830	19845
	2013-14	14321	0	0	0	307	0	4785	346	1474	20887
April-Sept.	2013-14(P)	7678	0	0	0	83	0	2456	178	630	10847
	2014-15(P)	7476	0	98	0	247	0	2713	187	821	11355
New Mangalore	2012-13	22538	2616	2553	4358	536	204	692	48	3539	37036
	2013-14	24647	3123	2928	5420	504	33	747	50	1963	39365
April-Sept.	2013-14(P)	12189	1177	1715	2657	314	58	367	25	899	19376
	2014-15(P)	10904	1144	1125	3190	340	0	493	34	1034	18230
Mormugao	2012-13	823	7421	768	6606	78	60	258	20	1724	17738
	2013-14	527	44	0	7518	179	44	235	19	3192	11739
April-Sept.	2013-14(P)	252	0	0	3486	36	44	112	10	1231	5161
	2014-15(P)	292	228	490	3074	84	0	110	11	2029	6307
J. L. Nehru	2012-13	4126	0	0	0	0	0	57911	4259	2451	64488
	2013-14	4414	0	0	0	0	12	55234	4162	2673	62333
April-Sept.	2013-14(P)	2456	0	0	0	0	12	27169	2061	1293	30930
	2014-15(P)	1820	0	0	0	0	0	28974	2233	1513	32307
Mumbai	2012-13	34751	0	4100	0	512	880	829	58	16966	58038
	2013-14	35980		4221	0	302	0	450	40	18231	59184
April-Sept.	2013-14(P)	17163	0	1837	0	104	0	216	19	8261	27581
	2014-15(P)	17813	0	2037	0	261	0	291	24	9429	29831
Kandla	2012-13	54544	925	4064	374	4624	3783	1935	118	23370	93619
	2013-14	53137	586	6080	270	3635	2732	452	29	20113	87005
April-Sept.	2013-14(P)	26959	435	3978	150	2168	1784	452	29	10025	45951
	2014-15(P)	27738	456	4545	132	2040	1925	0	0	9703	46539
All Ports	2012-13	180725	27289	58772	28032	14797	6597	119866	7713	109753	545831
	2013-14	187162	24766	71369	33146	13703	4388	114641	7456	106313	555488
April-Sept.	2013-14(P)	94544	11846	36481	16077	6967	2854	57834	3763	50625	277228
	2014-15(P)	93983	9177	39393	16081	7952	2434	60639	4009	58820	288479

Source: Major Ports and Indian Ports Association.

P : Provisional

Annex-III

Commodity Composition of Traffic Handled at Non- Major Ports.

(000 Tons)

Maritime Status / UTs	Period	POL	Iron Ore	Building Material	Coal	Fertiliser & FRM	Others	Total
1	2	3	4	5	6	7	8	9
	2011-12	151487	6919	9022	38372	7185	46065	259050
Gujarat	2012-13	165137	7636	8408	54337	6418	45881	287817
	2013-14	167318	5590	15122	65657	4769	51490	309946
April - Sept	2013-14	83128	3089	3785	34100	3104	25400	152606
	2014-15	81778	2979	6679	40651	3231	29622	164940
	2011-12	0	6362	2490	7589	230	3276	19947
Maharashtra	2012-13	397	7818	2042	10396	84	3461	24198
	2013-14	0	7825	1998	9715	0	5126	24664
April - Sept	2013-14	0	3226	854	5019	0	2185	11284
	2014-15	0	3929	999	5322	0	2449	12699
	2011-12	3508	2974	859	23512	7035	7745	45633
Andhra pradesh	2012-13	1762	977	1111	30854	5135	11972	51811
	2013-14	1766	1475	980	35568	5325	13585	58699
April - Sept	2013-14	791	367	526	19042	3206	5051	28983
	2014-15	675	2483	599	23300	2333	7266	36656
	2011-12	0	14305	0	165	0	0	14470
Goa	2012-13	0	3276	0	113	0	0	3389
	2013-14	0	3276		339	0	0	3615
April - Sept	2013-14	0	0	0	0	0	0	0
	2014-15	0	186	0	0	0	0	186
	2011-12	1114	0	7	0	46	43	1210
Tamil Nadu	2012-13	631	0	6	0	252	44	933
April - Sept	2013-14	788	0	27	0	41	10	866
	2013-14	339	0	17	0	24	2	382
	2014-15	383	0	10	0	26	59	478
	2011-12	0	0	19	0	29	544	592
Karnataka	2012-13	38	0	0	5	52	515	610
	2013-14	38	0	17	6	75	373	509
April - Sept	2013-14	73	0	4	0	31	98	206
	2014-15	168	0	0	0	17	91	276
	2011-12	213	56	469	9402	1217	1486	12843
Others states / Uts #	2012-13	600	2148	386	13559	607	1865	19165
	2013-14	543	4080	720	14601	354	1642	21940
April - Sept	2013-14	221	1714	309	6966	271	1095	10576
	2014-15	328	1407	333	8098	159	1134	11459
	2011-12	156322	30616	12866	79040	15742	59159	353745
All Non Major PORTS	2012-13	168565	21855	11953	109264	12548	63738	387923
	2013-14	170453	22246	18864	125886	10564	72226	420239
April - Sept	2013-14	84552	8396	5495	65127	6636	33831	204037
	2014-15	83332	10984	8620	77371	5766	40621	226694

: Includes Pondicherry, Orissa, Kerala, Andaman & Nicobar Islands and Lakshadweep Islands.
No traffic was handled at ports, Daman & Diu.

Annex-IV(a)

Commodity-Wise Capacity Available at Major Ports

(In Million Tonnes)

Commodities	KDS	HDC	PPT	VPT	EPL	ChPT	V.O.C.	CoPT	NMPT	MoPT	MbPT	KPT	JNPT	Total
1	2	3	4	5	6	7	8	9	10	11	12	13	14	15
POL														
As on 31.3.09	3.96	17.00	21.00	17.65	3.00	11.80	2.30	18.70	22.00	1.50	32.00	55.24	5.50	211.65
As on 31.3.10	3.96	17.00	21.00	17.65	3.00	11.80	2.30	18.70	22.00	1.50	32.00	62.83	5.50	219.24
As on 31.3.11	4.11	17.00	21.00	17.65	3.00	11.80	2.30	18.70	23.37	1.50	32.00	62.83	5.50	220.76
As on 31.3.12	4.50	17.00	21.00	17.65	3.00	15.27	2.30	19.01	23.37	1.50	32.00	66.60	5.50	228.70
As on 31.3.13	4.50	17.00	43.00	17.65	3.00	17.67	2.30	19.01	49.17	1.50	32.00	66.60	5.50	278.90
As on 31.3.14	4.50	17.00	43.00	25.65	3.00	17.67	2.30	24.01	49.17	1.50	32.00	66..60	5.50	291.90
Iron Ore														
As on 31.3.09		6.00	4.50	12.50		8.00			7.50	24.30		-		62.80
As on 31.3.10		6.00	4.50	12.50		8.00			7.50	28.30				66.80
As on 31.3.11		8.00	4.50	12.50	6.00^	8.00			7.50	33.00				79.50
As on 31.3.12		8.00	4.50	12.50	6.00	8.00			7.50	33.00				79.50
As on 31.3.13		6.00	4.50	12.50	6.00	8.00			7.50	27.50				72.00
As on 31.3.14		6.00	4.50	12.50	6.00	8.00			7.50	27.50				72.00
Coal														
As on 31.3.09		7.00	20.00		13.00		6.25							46.25
As on 31.3.10		7.00	20.00		13.00		6.25							46.25
As on 31.3.11		7.00	20.00		21.00		6.25							54.25
As on 31.3.12		7.00	20.00		21.00		12.55		5.40					65.95
As on 31.3.13		7.00	20.00		21.00		12.55		5.40					65.95
As on 31.3.14		7.00	20.00		21.00		12.55		5.40					65.95
Fertiliser														
As on 31.3.09			7.50	1.00				0.60						9.10
As on 31.3.10			7.50	1.00				0.60						9.10
As on 31.3.11			7.50	1.00				0.80						9.30
As on 31.3.12			7.50	1.00				0.80						9.30
As on 31.3.13			7.50	1.00				0.80						9.30
As on 31.3.14			7.50	1.00				0.80				2.00		11.30
Break-Bulk Cargo														
As on 31.3.09	6.30	12.70	18.00	29.38		16.80	9.26	4.76	14.70	7.25	9.80	14.80	0.80	144.55
As on 31.3.10	6.44	12.70	23.50	29.38		17.92	10.17	6.76	14.70	7.25	9.80	14.97	0.90	154.49
As on 31.3.11	6.51	14.70	23.50	31.28	1.00	17.92	13.49	8.98	14.70	7.40	11.53	16.88	0.90	168.79
As on 31.3.12	6.74	14.75	27.30	32.50	1.00	17.92	13.49	9.55	14.70	7.40	11.53	17.42	0.90	175.20
As on 31.3.13	6.74	12.75	27.30	33.50	1.00	17.92	13.49	12.35	14.70	7.40	11.53	19.42	0.90	179.00
As on 31.3.14	6.74	15.75	33.80	47.09	1.00	17.92	22.21	12.35	15.70	7.65	11.53	26.52*	0.90	219.16
Container														
As on 31.3.09	5.50	4.00		1.70		19.15	5.00	4.31			1.90	7.20	51.66	100.42
As on 31.3.10	5.50	4.00		1.74		33.60	5.00	4.31			1.90	7.20	57.60@	120.85
As on 31.3.11	5.73	4.00		2.50		42.00#	5.00	12.50**			1.00*	7.20	57.60@	137.53
As on 31.3.12	5.90	4.00		2.68		42.00	5.00	12.50			1.00	7.20	57.60@	137.88
As on 31.3.13	5.90	4.00		2.68		42.00	5.00	12.50			1.00	7.20	59.48 @	139.76
As on 31.3.14	5.90	4.00		2.68		42.45	5.00	12.50			1.00	7.20	59.48 @	140.21
TOTAL														
As on 31.3.09	15.76	46.70	71.00	62.23	16.00	55.75	22.81	28.37	44.20	33.05	43.70	77.24	57.96	574.77
As on 31.3.10	15.90	46.70	76.50	62.27	16.00	71.32	23.72	30.37	44.20	37.05	43.70	85.00	64.00	616.73
As on 31.3.11	16.35	50.70	76.50	64.93	31.00	79.72	27.04	40.98	45.57	41.90	44.53	86.91	64.00	670.13
As on 31.3.12	17.14	50.75	80.30	66.33	31.00	83.19	33.34	41.86	50.97	41.90	44.53	91.22	64.00	696.53
As on 31.3.13	17.14	46.75	102.30	67.33	31.00	85.59	33.34	44.66	76.77	36.40	44.53	93.22	65.88	744.91
As on 31.3.14	17.14	49.75	108.80	88.92	31.00	86.04	42.06	49.66	77.77	36.65	44.53	102.32	65.88	800.52

Figure in the parenthesis indicate the number of berths. BJ Barge jetties, T-Transhippers, A-Anchorages, SBM-Single Buoy Mooring

@ : Capacity of JNP Container Termnal (3berths), NSICT (2berths), GTIPL (3berths) & shallow water berth(1no.) has been taken as 16.88 MT, 15.0 MT, 26.40 MT and 1.20 MT respectively.
Capacity of one shallow water berth at JNPT is .90 MT for dry bulk cargo.

Capacity of Iron Ore berth has been taken as 6.0MT at Ennore Port. After full fledged commissioning, balance capacity of 6.0MT will be added.

Only BPS berth of Mumbai Port is considered as dedicated container berth. Assessed capacity of BPS (Dedicated) container berth of Mumbai Port is 1.0MT. Berth No.6, 7/8 ID are used as holding berths of MbPT crafts and no ID are used as holding berth for MbPT crafts & no capacity has been accounted.

* After accounting the capacity due to productivity, addition of berth No. 13 & 15, MHC,Floating cranes.

Source : Development Wing - Department of Shipping.

Annex-IV(b)

PROVISIONAL COMMODITY WISE CAPACITY OF MAJOR PORTS AS ON 31.3.2014

(IN MILLION TONNES)

Sl no.	Commodity	Kolkata	Haldia	Paradip	Vizag	Chennai	Ennore	Tuticorin	Cochin	New Mangalore	Mormugao	Mumbai	Kandla	J.N.P.T	Total
1.	P.O.L	4.50+ 4.0 (7)+A	17.00 (3+2BJ)	43.00(1 +3)+SB M	25.65 (4+1S BM)	17.67 (2)	3.00 (1)	2.30 (1)	24.01 (4+1 SBM)	49.17 (5+ISPM)	1.50 (1)	32.00 (5)	66.60 +0.8 (8+3SBM) A	5.50 (2)	291.90+4.80 (44+8SBM+ 2BJ)
2.	IRON ORE		6.00 (2)	4.50 (1)	12.50 (1)	8.00 (1)	6.00(1)			7.50 (1)	27.50 (1+3Trans)				72.00 (8+3Trans)
3.	Coal (Thermal)		7.00 (2)	20.00 (2)			21.00 (3)	12.55 (3)		5.40 (1)					65.95 (11)
4.	Fertilizer			7.50 (2)	1.00 (1)				0.80 (1)				2.00 (1)		11.30 (5)
5.	Gen. Break Bulk Cargo	6.74+0. 51 (22)+A	12.75 (8)	33.80 (9)	47.09 (15)	17.92 (14)	1.00 (1)	22.21 (10)	12.35 (12)	15.70 (8)	7.65 (4)	11.53+6 .0(25)A	26.52* (13)	0.90 (1)	219.16+ 6.51(142)+ A
6.	Containe rs	5.90 (4)	4.00 (2)		2.68 (1)	42.45 (7)		5.00 (1)	12.50 (2)			1.00 (1)	7.20 (2)	59.48 @ (9)	140.29 (29)
Total		17.14+ 4.51 (33)+A	49.75 (17+2B J)	108.80 (15+3S BM)	88.92 (22+1 SPM)	86.04 (24)	31.00 (6)	42.06 (15)	49.66 (19+1SB M)	77.77 (15+1SPM)	36.65 (6+3Trans)	44.53+ 6.0 (31)+A	102.32+0.8 (24+3SBM)+A	65.88 (12)	800.52+11.3 1(239)+9SB M+3Trans+ 2BJ)+A

Figure in the parenthesis indicate the number of berths. BJ Barge jetties, T-Transhippers, A- Anchorages, SBM- Single Buoy Mooring

@ Capacity of JNP container terminal (3 berths), NSICT (2 berths) GTIL (3 berths) and shallow water berth (1 no) has been taken as 16.88 MT, 15.00 MT, 26.40 MT and 1.20 MT respectively. Capacity of one shallow water berth at JNPT is 0.90 MT for dry bulk cargo.

Capacity of Chennai Container Terminal I (4 berths) and II (3 berths) has been taken as 24MT and 18MT respectively.

Capacity of Iron Ore berth has been taken as 6.0MT at Ennore Port. After full fledged commissioning, balance capacity of 6.0MT will be added.

Only BPS berth of Mumbai Port is considered as dedicated container berth. Assessed capacity of BPS (Dedicated) container berth of Mumbai Port is 1.0MT. Berth No. 6, 7/8 ID are used as holding berths for MbPT crafts and no capacity has been accounted.

*After accounting the capacity due to productivity, addition of Berth No. 13,&15,MHC,Floating cranes.